

Distribution Planning Community Engagement Needs Assessment Study

DRAFT SCOPE OF WORK

December 12, 2022



**California Public
Utilities Commission**

Thanks to:

The consulting teams from Verdant and Gridworks for their support in preparing this Draft Scope of Work.

Contents

INTRODUCTION AND PURPOSE	4
Scope of Work Organization	6
BACKGROUND.....	7
CPUC Proceedings	7
Community Engagement in CPUC Proceedings	9
Fall 2022 Informal Outreach Meetings	9
Feedback on Community Needs from Distribution Systems	10
Feedback on the Utilities' Community Engagement for Distribution Planning	11
Study Execution Feedback	11
PROJECT OBJECTIVES	14
Objective 1: Understand Current Distribution Planning Community Engagement	15
Engage Diverse Community Groups	15
Tasks and Deliverables for Objective 1	16
Objective 2: Document Distribution Planning for Community Needs	16
Tasks and Deliverables for Objective 2	17
Objective 3: Develop Community Advisory Groups	17
Tasks and Deliverables for Objective 3	19
Objective 4: Development and Evaluation of Metrics	19
Other Metrics to Consider based on Informal Outreach Meetings	20
Tasks and Deliverables for Objective 4	20
Objective 5: Gather and Report Community Feedback on Future Grid Study	20
Future Grid Study Overview	20
Community Feedback Options for the Future Grid Study	21
Tasks and Deliverables for Objective 5	27
Objective 6: Report on Distribution Planning Community Needs and Develop Recommendations for Improvement	27
Tasks and Deliverables for Objective 6	28
DRAFT PROJECT BUDGET, DELIVERABLES, AND SCHEDULE	29
DRAFT PROJECT SCOPE.....	31
Task 1: Project Management	31
Task 2: Conduct Research Material Review and Collaborate/Interview CPUC, IOUs, the High DER Consulting Team, and other Stakeholders	32

Task 3: Develop a Detailed Research Plan	33
Task 4: Recruit and Work with Advisory Groups, Develop Metrics	35
Task 5: Future Grid Study Community Feedback Report	37
Task 6: Distribution Planning Community Engagement Needs Assessment	37
Task 7: Comprehensive Database of all Community Outreach Feedback	39
Task 8: Support Staff Proposal for Distribution Planning Process Guidelines and Associated High DER Tasks	39
APPENDICES	40
Appendix A: Summary of Informal Outreach Meetings	40
Overview	40
Objectives	40
Outreach Meeting Participants	41
Outreach Meeting Format and Content	44
Summary of Outreach Meeting Questions and Input	44
A. Tribal outreach sessions	47
B. Rural/County Governments	51
C. Urban/Suburban Governments	55
D. Advocacy organizations	58
E. Meetings with Mixed Organizational Representation	62
Select Attachments Provided by Participants	66

Tables & Figures

Figure 1: Distribution Planning and Outcomes Framework 5

Figure 2: High DER Proceeding Tracks 9

Figure 3: Adopted Work Plan (November 15, 2021, Scoping Ruling, R.21-06-017) 23

Table 1: Meeting Date, Duration, Attendee Description, and IOU Service Territory 43

Table 2: Frequent Outreach Meeting Participant Feedback..... 45

Introduction and Purpose

The California Public Utilities Commission (CPUC or Commission) initiated the High DER Grid Planning Rulemaking (R.) 21-06-017 (the High DER proceeding) in July 2021 to prepare the electric grid for a high number of Distributed Energy Resources (DERs). DERs include electric vehicles, distributed renewable generation such as solar, energy storage, demand response technologies, and energy efficiency. Among the objectives of the High DER proceeding is identification of strategies for planning and forecasting distribution system investments necessary to support millions of DERs on the grid, while maintaining affordable rates.

Identifying ways to enhance community engagement in utility distribution planning is one of the goals of the proceeding. In the Scoping Ruling for the proceeding, a community engagement needs assessment was planned to support achievement of this objective.¹ The final version of this Scope of Work (SOW) is expected to result in a request for proposal to solicit bids for conducting the Distribution Planning Community Engagement Needs Assessment Study (the Study) planned in the Scoping Ruling. This document is a draft of the SOW that will be revised based on stakeholder comments.

The purpose of the Study is to address two related questions:

1. What do communities want and need with respect to electric utility distribution planning?
2. Are there ways in which utility distribution planning representatives could better engage with local and tribal governments, environmental and social justice communities, and local developers to ensure new planned loads and developments are factored into utility distribution planning processes, and local concerns regarding distribution planning are adequately addressed?

The focus of the above questions on local concerns and diverse communities in a state as large as California will necessitate the investigation of a broad range of issues. For example, distribution planning community engagement will be a critical factor in determining whether the electric grid is ready in time to support electrification and other community development projects, especially those designed to meet community climate change goals and address equity and affordability concerns. The Study will focus on community engagement in the distribution planning process, answering these questions in a final report that will inform a 2024 CPUC Decision anticipated in the Scoping Ruling to consider changes and improvements to the distribution planning process. As the timing of Study findings and insights allow, there may be opportunities to support decision making on near-term improvements for distribution planning (see High DER Proceeding Track 1, Phase 1).

A Distribution Planning and Outcomes Framework is described in this SOW. Key relationships among elements of the distribution planning process are depicted graphically as a Distribution Planning and Outcomes Framework in Figure 1. A feedback loop exists, where information from community engagement is one input into the utility distribution planning process. This information includes consideration of the

¹ Assigned Commissioner's Scoping Memo and Ruling, R.21-06-017, November 15, 2021, at page 13.

wants and needs of communities. The utility distribution planning process results in design decisions and infrastructure investment, the outcomes of which are experienced by members of communities.

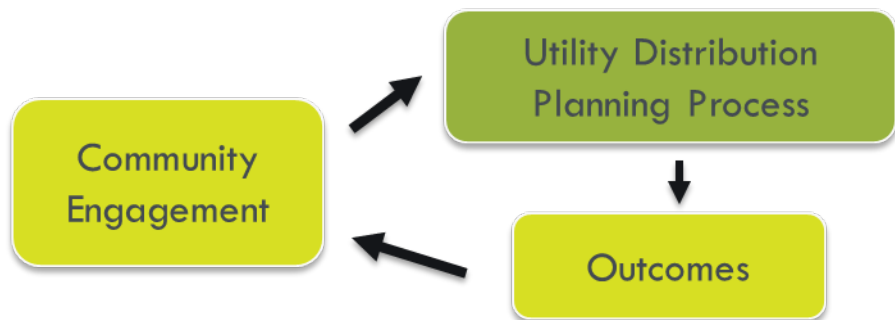


Figure 1: Distribution Planning and Outcomes Framework

The process repeats, as the outcomes of past design decisions and infrastructure investments inform future community engagement. For example, if construction of a residential subdivision is delayed due to grid constraints, that adverse outcome is likely to be included as a topic of future community engagement. Outcomes metrics envisioned by this SOW can be used to track the overall performance of the distribution planning process in satisfying the wants, needs, and concerns of communities. Outcomes metrics are discussed further in a later section (‘Project Objectives’).

The Study presented in this SOW is intended to compliment the more technical work currently underway by the High DER Consulting Team composed of Verdant Associates, LLC., Kevala, Gridworks, and Xanthus Consulting, LLC.² The estimated budget for this Study is **two million dollars**, including at least **six hundred thousand dollars** earmarked to fund CBOs and tribes for outreach, workshops, surveys, and coordination. Work on the Study is expected to be performed from roughly September 2023 through September 2025. Additional details regarding the budget and schedule are discussed below in section ‘Project Budget and Schedule’.

This draft SOW also presents options to support outreach associated with the Future Grid Study to be developed under High DER proceeding Track 2, which is one of the technical reports anticipated by the Scoping Ruling. Stakeholder feedback will be sought to inform CPUC decision-making on the option appropriate for inclusion in the final SOW. The options are intended to be responsive to formal comments filed on the Order Instituting Rulemaking,³ informal comments received during and after the May 3, 2022, workshop, and informal comments received during and after the August 23, 2022, workshop.⁴

² The High DER Consulting Team will not bid on any request for proposals that may be issued based on this SOW.

³ Energy Division hosted a workshop on September 22, 2021, to discuss High DER proceeding scope and the schedule for resolving issues as directed by the Order Instituting Rulemaking.

⁴ Details about the May 2022 and August 2022 High DER proceeding workshops, including informal comments received, are provided at <https://gridworks.org/initiatives/california-future-grid-study>.

Scope of Work Organization

This SOW is organized as set forth below:

- An **Introduction and Purpose** (this section) that articulates the purpose of this SOW and the questions it is trying to answer as well as problems it is trying to solve.
- A **Background** section that describes the High DER Proceeding and how this SOW will complement other work already planned or being conducted in that proceeding. This section also includes a summary of recently completed informal outreach meetings, and how these meetings influenced development of this SOW.
- A **Project Objectives** section that details what the different objectives of this Study are, or the ‘**what and the why**’ of this study.
- A **Draft Project Budget and Schedule** that outlines ‘**when**’ the work under this study is planned to happen.
- A **Draft Project Scope** that details the tasks planned as part of this Study that Bidders will need to address. This section is an operationalization of the Project Objectives with more of the Study’s ‘**how**’, but Bidders should be left to propose the best approaches to meet these objectives.

Background

This Study will be conducted under the High DER proceeding and will contribute to a broad, well-established effort spanning multiple Commission proceedings. This regulatory context is summarized below, along with a summary of relevant work that was completed recently and that contributed to the development of this SOW.

CPUC Proceedings

The CPUC has established numerous policies governing distribution planning through formal proceedings over the last several years. In summary, these include:

- The High DER proceeding (R.21-06-017)⁵ is the successor to the Distribution Resources Plans (DRP) proceeding (R.14-08-013, closed September 9, 2021, Decision [D.] 21-09-005).
- The DRP was one of two complementary and related proceedings opened by the Commission in 2014.⁶ The DRP, along with the Integrated Distributed Energy Resources (IDER) proceeding (R.14-10-003, closed June 20, 2022, D.22-06-027), were opened in response to Assembly Bill (AB) 327 (Perea, 2013) and to fulfill requirements of California Public Utilities Code.

AB 327 was a multi-part bill affecting a number of the provisions of regulated utility service.

The DRP proceeding focused on distribution planning, development of tools to facilitate integration of DERs into Investor Owned Utility (IOU) electric distribution planning, and a directive for the Commission to review, modify, and approve IOU distribution resources plans. A key result of the DRP proceeding was adoption (D.18-02-004, February 8, 2018) of the Distribution Investment Deferral Framework (DIDF), which established many of the rules governing the current distribution planning processes and established an annual Grid Needs Assessment to inform distribution planning. The DIDF also established a solicitation process to evaluate and procure DERs as cost-effective alternatives to planned distribution investments.

The High DER proceeding's purpose is to prepare the electric grid for a high number of DERs, including those specific to transportation electrification. It will consider increasing community engagement with distribution planning and investigating IOU, distribution operator, and DER stakeholder roles and responsibilities that:

- Enable swift evolution of grid capabilities and operations to integrate solar, storage, electric vehicles, electric vehicle supply equipment, and other DERs to meet the State's 100 percent clean energy goals;

⁵ The Study is being conducted as part of the High DER Proceeding.

⁶ For a more detailed summary of pertinent legislative and regulatory history, bidders are referred to Section 1 of the High DER Order Instituting Rulemaking, Order Instituting Rulemaking to Modernize the Electric Grid for a High Distributed Energy Resources Future, R.21-06-017, June 24, 2021.

- Improve distribution planning, including charging infrastructure forecasting to support cost effective and widespread TE; and
- Optimize grid infrastructure investments by facilitating community input about planned developments, DER siting plans, and resiliency needs.

Objectives and issues to be addressed in the High DER are set out in the Scoping Ruling for the proceeding. Two of the issues presented in Track 1 of the proceeding directly concern engagement between IOUs and the communities they serve. These issues are key motivation for the Study.⁷

1. Track 1 Phase 1 Scoping Question #5:

- » What initial analysis is needed for the Commission to determine in Track 1, Phase 2, of this proceeding how best to improve local engagement in utility distribution planning?

2. Track 1 Phase 2 Scoping Question #3:

- » Leveraging the analysis identified in Track 1, Phase 1, are there ways in which utility distribution planning representatives could better engage with local and tribal governments, environmental and social justice communities, and local developers to ensure new planned loads and developments are factored into Utility distribution planning and local concerns regarding distribution planning are adequately addressed?

Track 2 of the High DER proceeding addresses ‘Distribution System Operator Roles and Responsibilities’. While the main focus of Track 2 is grid operations, elements of grid planning are also included. Track 2 Scoping Questions include:

1. How do alternative distribution system operator models compare in their ability to plan and operate a high DER grid, unlock economic opportunities for DERs to provide grid services, limit market power, reduce ratepayer costs, increase equity, support grid resiliency, and meet State policy objectives?
2. Should the Utilities be incentivized to cost-effectively prepare for widespread DER deployments? If so, how?

The information gathered and the Study that will result from the SOW set out here will help inform staff’s analysis and recommendations regarding issues associated with all three tracks of the High DER proceeding.

The three different tracks of the High DER proceeding are shown in Figure 2. This Study is primarily focused on Track 1 but will also inform Track 2 (pending identification of the best option for Future Grid Study feedback; Objective 5 and Task 5.)

⁷ Assigned Commissioner’s Scoping Memo and Ruling, R.21-06-017, November 15, 2021.

Three High DER Proceeding Tracks

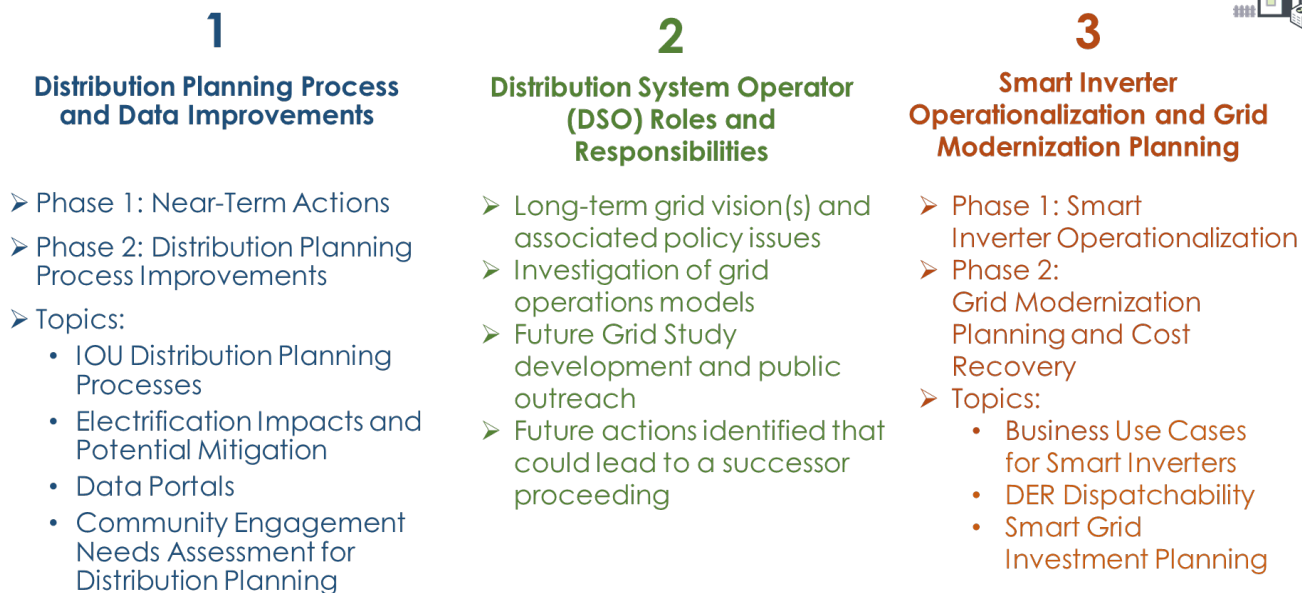


Figure 2: High DER Proceeding Tracks

Community Engagement in CPUC Proceedings

Other CPUC proceedings are also studying the engagement of IOUs and the communities they serve. Development of climate adaptation vulnerability assessments ordered in the Climate Adaptation proceeding (R.18-04-019) include extensive research into the impacts of climate change on disadvantaged vulnerable communities (DVCs), including impacts involving distribution planning. The Microgrids and Resiliency proceeding (R.19-09-009) ordered the utilities to conduct semi-annual, face-to-face, county-level workshops to help ensure the IOUs take a collaborative approach with local entities to planning for grid resiliency measures and that the IOUs are responsive to local needs.⁸

Climate change vulnerability assessments prepared by each utility every four years are preceded by extensive data collection guided by community engagement plans. To facilitate collection of data from difficult to reach communities, the utilities work with community groups and California tribes. Familiarity with IOU data collection activities under the Climate Adaptation proceeding and data review will be helpful for those performing the Study envisioned in this SOW.

Note that any information from the Climate Adaption proceeding relied upon for purposes of recommendations in this proceeding will need to be incorporated as part of the record for this proceeding.

Fall 2022 Informal Outreach Meetings

⁸ D.20-06-017 at Ordering Paragraph 7.

Preliminary research for this Study was conducted by the CPUC and its consultants in Fall 2022.⁹ Over the course of several weeks, 20 meetings were held with representatives of 45 communities including:

- Tribal Governments
- Local government organizations, including urban/suburban and rural/county governments, and
- Community-based, non-governmental, or advocacy organizations, termed “advocacy organizations” throughout this summary.

The CPUC’s objectives in hosting the informal outreach meetings were to:

1. Listen to tribes, local governments, and community-based organizations (the Participants) stakeholders to gain an understanding and gather information about:
 - A. The Participants’ **priorities** with respect to energy (electric and gas);
 - B. The Participants’ **challenges and barriers** to adopting clean energy technologies and DERs;
 - C. The Participants’ **long-term visions** and the role of electric utilities and DERs in achieving those visions;
 - D. How the CPUC and California Energy Commission can achieve **meaningful participant outreach** and establish partnerships; and
 - E. How the utilities (PG&E, SCE, and SDG&E) can best include the participants in **electric distribution system planning**.
2. Communicate to meeting participants how insights from these outreach meetings will be used to:
 - A. Inform development of a draft scope of work for a statewide **Community Engagement Needs Assessment** study to launch in 2023; and
 - B. Gain insights about potential visions, objectives, and characteristics of a future electric grid for California, which will inform a **Future Grid Study**¹⁰ to be developed in 2023.

Summaries of the informal outreach meetings are included in Attachment A. Insights received during the informal outreach meetings informed the draft scope of work for the Distribution Planning Community Engagement Needs Assessment Study presented in this document. Some of the key points from the informal meetings and how the meetings informed development of this SOW are described below.

Feedback on Community Needs from Distribution Systems

The recurring concerns and needs that informal outreach meeting participants shared concerning the electric distribution system include:

⁹ The CPUC's consultants for the High DER proceeding include a team led by Verdant Associates, LLC, with subcontractors Kevala, Gridworks, and Xanthus Consulting (State of California Contract #20NS1109). Members of the consulting team working under Contract #20NS1109 are not eligible to respond to the request for proposals that may be approved for issuance by the CPUC based on this SOW because they developed the SOW in coordination with CPUC Energy Division staff.

¹⁰ Under Track 2 of the High DER proceeding, Gridworks will be conducting a Future Grid Study to investigate a range of possible Distribution System Operator roles and responsibilities that could be adopted in the future. The Draft SOW provided in this document includes scope for socializing the Draft Future Grid Study with communities in California and obtaining feedback.

- **Reliability and Resiliency:** Participants expressed concern about electric service reliability combined with a desire to increase resiliency in the face of increasing severe weather events, shutoffs due to wildfire risk and increasing demands on the grid due to transportation and building electrification. Reliable and resilient electric service can be a matter of life-and-death for customers that rely on electricity for medical needs. When outages do occur, communities desire specific explanations of the causes (e.g., “Planned Maintenance”), as opposed to general explanations (e.g., “Other”).
- **Interconnection of Distribution Generation and Energization of Transportation and Building Electrification Loads:** Participants are frustrated with a lack of grid capacity to quickly interconnect new loads, which can impede transportation and building electrification, and economic development. Participants also stated that delays in connecting other DERs such as solar and storage were frustrating and hinder achievement of clean energy goals and increased resiliency.
- **Affordability:** Most participants are concerned about the cost of energy, especially those representing lower-income and disadvantaged communities.
- **Enabling More Local Clean Energy:** Many participants expressed the desire to “make and use our own local clean energy.”
- **Energy Access:** Some participants, particularly tribes, noted that some of their constituents still live without easy access to the electricity grid. All Californians should have equitable access to the electricity grid.

Feedback on the Utilities' Community Engagement for Distribution Planning

Feedback on the utilities’ engagement with communities for distribution planning included:

- **Visibility:** Communities would like to have greater visibility into utility planning to help avoid cases where distribution capacity fails to keep pace with growth in demand for electricity distribution services. This may include improved utility sharing of electric distribution grid data.
- **Partnership:** Representatives of energy-producing rural communities desire engagement with utilities’ distribution planning representatives that is marked by a greater degree of partnership.
- **Funding Mechanisms for Community Engagement:** Ongoing, meaningful engagement of communities with utilities’ distribution planning representatives may require those communities to be compensated.
- **Energy Literacy:** To effectively engage in a discussion about community engagement for distribution planning, representatives of communities, such as those from tribes, local governments, and CBOs, may need to be provided with a basic understanding of the planning process and energy.

Study Execution Feedback

Participants in the informal outreach meetings provided a significant amount of feedback on how they thought this Study should be conducted and what groups would be best positioned to perform this Study.

Some key themes of this feedback are the importance of **local presence, local expertise, and community trust** when seeking input from historically underrepresented or excluded communities. Key feedback from these informal outreach meetings that is relevant to executing this Study includes:

- **Need to Leverage Trusted Community Groups and Leaders:** Local organizations such as tribal groups, local governments, CCAs, and CBOs have already invested significant effort in understanding and building the trust of the communities they serve or represent. This local understanding and trust are critical to facilitate effective communication. Many participants strongly suggested that this Study should be led by a CBO or a team of CBOs. Bidders will need to explicitly describe how they propose to identify, recruit, and work with local organizations to represent the many different groups in each of the IOUs' territories.
- **Need to Show that Community Engagement Will Lead to Meaningful Change:** Too often, utility community engagement and outreach have been viewed by community groups as 'window dressing' that doesn't lead to meaningful change. The objectives in the Project Summary are intended to help mitigate this concern but Bidders should expand on those and detail how their proposed approach will lead to meaningful change and how Bidders propose to communicate that to communities.
- **Need to Coordinate with Similar Efforts:** CBOs and community groups have limited capacity for additional work, such as participating in or helping to facilitate the Study. This Study will need to coordinate with other outreach and engagement efforts such as those in the Climate Adaptation Proceeding (R.18-04-019) and Microgrids Proceeding (R.19-09-009) to minimize duplication and to substantially leverage across efforts. Note that this Study and the High DER proceeding need to develop a record separately from those proceedings.
- **Recommendation to Leverage CCAs:** Like the use of CBOs, several participants strongly recommended that CCAs assist with – or even lead – the Study, again making use of local presence, knowledge, and trust.
- **Need to Meet Communities Where They Are:** Local in-person meetings are needed to reach communities, especially those historically underserved and with limited internet access. This should include proactive outreach in addition to cultural competency and language access. These meetings should leverage existing community meetings, city council meetings, faith-based gatherings, and other meetings during or after business hours as required by the community meeting timing. Additionally, for some communities, both in-person and web-based meetings need to be held after working hours and on weekends to enable participation of groups that don't have the flexibility to take time off work during daytime working hours.
- **Need for Compensation of CBOs Performing Data Collection:** Several participants emphatically stated that many local community groups and CBOs do not have the funding to participate in the sort of data collection activities that will be needed for this Study. This funding could include compensation (potentially via gift cards), providing food, and childcare for individuals participating in community meetings. Additionally, for CBOs, funding is critical to allow these CBOs to stretch beyond their core roles and leverage the trust these organizations have built within their communities.

- **Need to Communicate in Non-Technical, Plain-Language Terms:** To effectively engage with communities, materials need to be developed in clear, concise, non-technical terms.
- **Recommend the use of Working Groups:** Longer-term engagements are needed for such complex topics as integrating community engagement and needs into distribution planning. For some professionals, such as city planners, participation in named working groups can help get management support for regular meetings.
- **Need to Provide Accessibility Support:** This includes the need to provide sign language interpretation for meetings and webinars and publish materials in accessible formats such as large print, brail, and audio. Additionally, materials should be made available in print format for those with no or limited internet access. Finally, web-based content should conform to Web Content Accessibility Guidelines 2.1.
- **Technical Assistance:** Many communities stated that they lack the technical ability and capacity to effectively engage in distribution planning and will need technical assistance to effectively engage with the distribution planning process. Education is one path to improve this, but providing technical advisors is a potentially more robust solution that would also aid these communities in implementing grid improvements or DER deployment and interconnection.
- **Need to Provide Language Access:** Meetings and outreach may need to be facilitated in multiple languages to better reach specific populations. This will likely be done by the local organizations leading outreach to their constituents. Depending on the constituents, these languages may include not just Spanish but other languages such as Vietnamese, Tagalog, Cantonese, Mandarin, Korean, and others.

The above needs and recommendations focus on collecting data from historically underrepresented or excluded communities. Other considerations may apply to collecting data from the utilities' distribution planning representatives, state regulators, representatives of local governments, and stakeholders involved with large additions of new load. Data collection from these groups could follow more traditional approaches such as in-depth interviews and surveys.

Project Objectives

There are six distinct objectives for this SOW and associated deliverables. If funding is approved by the CPUC then a request for proposals will be issued. Future bidders would describe how they propose to cost-effectively meet each of these objectives:

1. Understand Current Distribution Planning Community Engagement
2. Document Distribution Planning Responsiveness to Community Needs
3. Develop Community Advisory Groups
4. Develop and Evaluate Metrics
5. Gather and Report Community Feedback on Future Grid Study¹¹
6. Report on Distribution Planning Community Needs and Develop Recommendations for Improvement

The Project Scope section of this SOW identifies the tasks to be carried out to complete each objective. The following table identifies the tasks associated with each of the six project objectives.

Objectives	Associated Tasks ¹²
1. Understand Current Distribution Planning Community Engagement	Task 2: Conduct Research Material Review and Collaborate/Interview CPUC, IOUs, the High DER Consulting Team, and other Stakeholders Task 3: Develop a Detailed Research Plan
2. Document Distribution Planning for Community Needs	Task 2: Conduct Research Material Review and Collaborate/Interview CPUC, IOUs, the High DER Consulting Team, and other Stakeholders Task 3: Develop a Detailed Research Plan
3. Develop Community Advisory Groups	Task 3: Develop a Detailed Research Plan Task 4: Recruit and Work with Advisory Groups, Develop Metrics
4. Develop and Evaluate Metrics	Task 4: Recruit and Work with Advisory Groups, Develop Metrics
5. Gather and Report Community Feedback on Future Grid Study	Task 5: Future Grid Study Community Feedback Report Task 7: Comprehensive Database of all Community Outreach Feedback
6. Report on Distribution Planning Community Needs and Develop Recommendations for Improvement	Task 6: Distribution Planning Community Engagement Needs Assessment Task 7: Comprehensive Database of all Community Outreach Feedback Task 8: Support Staff Proposal for Distribution Planning Process Guidelines and Associated High DER Tasks

¹¹ Inclusion of this objective in the SOW depends on the option for Future Grid Study outreach support selected by the CPUC. Some options may not include scope for Bidder proposals. Refer to the Future Grid Study Overview and Community Feedback Options section of this SOW.

¹² Task 1 outlines project management duties and is described in more detail in the Draft Project Scope section below.

Objective 1: Understand Current Distribution Planning Community Engagement

This objective aims to document how the IOUs currently engage with communities for distribution planning. This information will be used to establish a baseline for current IOU community engagement for distribution planning purposes.

The distribution planning process involves collection and analysis of very large quantities of information of many types, from many sources as inputs. Some of that information is provided by *communities*. Here, the word *communities* refers to groupings of the individual people, typically tribal areas, cities, and counties, that rely on the electric distribution services that are eventually provided after distribution plans are developed and implemented by their utility provider. The quality of an electric distribution planning process can be judged by the extent to which it does – or does not – lead to providing electricity distribution services that communities need. Using a combination of interviews, community meetings, and/or focus groups with utilities and community representatives, the successful Bidder will collect data necessary to understand community engagement information inputs

Engage Diverse Community Groups

The many diverse community groups that represent California’s citizens each have unique needs and interactive experiences with the distribution planning process. Additionally, each of these groups will have different knowledge and capabilities to bring to the distribution planning discussion. Some of these groups and how they interact with the distribution planning process and the constituents they represent include:

Governments and Tribal Governments. Representatives of city and county governments serve as intermediaries between the individuals constituting their communities and utility distribution planning representatives. City and county planning departments may have local knowledge of trends in their communities that will impact future needs for electricity distribution services. Local governments may have some responsibility for satisfying state or federal mandates that involve some reliance on electricity distribution. At the statewide level, the California Energy Commission plays a key intermediary role in distribution planning. The CEC's Integrated Energy Policy Report provides energy and power forecasts that guide the distribution planning process.

Representatives of California tribes may serve as intermediaries between their individual members and electric distribution planning representatives. These relationships with California tribes are distinguished from other governments in that the California tribes are sovereign nations. While they may share many of the same opportunities and barriers as faced by city, county, or state governments, other aspects of their involvement in the distribution planning may be different due to their sovereign nation status.

Companies. For example, the number of electric vehicles will increase significantly in the future, and many more charging stations will be needed. While individual members of communities will depend on charging stations, companies involved with developing charging stations likely are better able to provide useful information to the distribution planning process about electricity distribution needs for electric vehicle

charging (where, when, size) than any individual who may buy their first electric car a few years from now. In this type of capacity companies may serve as intermediaries between individual members of communities and utility distribution planning representatives.

Advocacy Non-Profits/CBOs. A variety of advocacy non-profits and CBOs participate in current distribution planning processes, providing valuable perspectives in areas related to environmental, equity, and other issues.

Representative questions concerning community engagement in the Distribution Planning and Outcomes Framework include the who, how, when, and what of engaging with communities for distribution planning:

- Who are the utilities engaging with to obtain the necessary input information for electricity distribution plans?
- How is that engagement occurring?
- When is the engagement occurring?
- What information is resulting from the community engagement that is used as input to the electricity distribution planning process?

These questions would be addressed to both the IOUs as well as communities to understand the multiple different viewpoints that may exist.

Tasks and Deliverables for Objective 1

This objective maps to Task 2 in the project scope resulting in a memo (Memo 1) describing the current community engagement efforts undertaken by the IOUs, CPUC, CCAs, and the CEC. Task 3 to develop a research plan is also associated with this objective.

Objective 2: Document Distribution Planning for Community Needs

This objective is to document how the current distribution planning process at each IOU responds to community needs that are received through community engagement. This will describe the second step of the Distribution Planning and Outcomes Framework shown in Figure 1. This document will serve as a baseline from which potential improvements will be recommended.

Community needs such as interconnection requests, reliability improvements, or increasing energy affordability inform distribution planning and implementation. Those distribution planning activities create a link between community engagement on the front end of the Distribution Planning and Outcomes Framework, and outcomes (such as interconnecting new DERs or changes in reliability) experienced by communities and individuals on the back end. Representative questions concerning distribution planning in the Distribution Planning and Outcomes Framework include:

- How do utility planners record, prioritize, and respond to information about community needs in the distribution planning process?

- How do IOUs promote equity as part of the distribution-planning process?
- How does information obtained from community engagement inform distribution planning?
- How do IOUs reconcile communities’ aspirational needs and goals with current planning frameworks that are based on statewide forecasts from the CEC? What alternative or additional measures could be utilized to ensure anticipated community needs for electricity distribution can be incorporated into utility distribution planning processes?

Tasks and Deliverables for Objective 2

This objective maps to Task 2 in the project scope resulting in a memo (Memo 2) describing how the current IOU distribution planning process incorporates the inputs from the existing community engagement process. Task 3 to develop a research plan is also associated with this objective.

Note that this document will help inform some of the more technical improvements being developed by the current High DER consulting team.

Objective 3: Develop Community Advisory Groups

This objective is to develop Community Advisory Groups or other similar structures and then utilize these groups to expand on the existing IOUs’ distribution planning community engagement efforts. These groups should also build on the informal outreach meetings described previously and in more detail in Appendix A. Developing and utilizing these groups will be the bulk of the effort in this Study and will be central to this Study’s success. The purpose of these groups is multi-fold:

- Fill any gaps in the IOUs’ existing distribution planning community engagement plans, **especially from non-traditional parties that don’t often participate in the distribution planning process.**
- Provide meaningful feedback and guidance on metrics as described in Objective 4: Development and Evaluation of Metrics
- Support feedback on the Future Grid Study as described in Objective 5: Gather and Report Community Feedback on Future Grid Study
- Help develop and review recommendations as described in Objective 6: Report on Distribution Planning Community Needs and Develop Recommendations for Improvement

The Winning Bidder will need to propose a framework for these groups that is responsive to the feedback from the Fall 2022 Informal Outreach Meetings. It is expected that these groups will need to be separate for each IOU service territory. These groups should be designed to represent the diverse constituencies in California, including:

- **Community organizations that represent California’s diverse constituencies.** These groups should be led and facilitated by CBOs and/or CCAs to leverage local knowledge and trust these organizations have built in their communities. As repeatedly noted in the informal community outreach meetings, the CBOs leading these groups should be compensated in addition to funding for community meetings. These meetings may need to be held after hours or on weekends to enable community participation.

- **Tribal governments**, like community organizations, tribal representatives reported that local trust will be paramount to enable clear and direct feedback on the unique distribution planning needs that California’s tribes face. Additionally, the pending California Tribal Gap Analysis should be closely reviewed as a potential guidebook for this work and, ideally, with similar pathways leveraged from that work. That analysis was based on surveys combined with secondary research “to identify tribal priorities, needs, and barriers in the areas of clean energy and climate change adaptation and resilience, and to provide recommendations for the development and enhancement of State of California programs, funding, technical assistance, and other support to address tribal needs and priorities. The California Tribal Gap Analysis also seeks to advance collaboration and build relationships between Tribes and State agencies to support current and future Tribal-State partnerships and grant programs.”¹³ The California Tribal Gap Analysis was not focused as closely on distribution planning as this study will be but information from that analysis and any lessons learned about successful tribal engagement strategies should be incorporated into this Study.
- **Local Governments, Planners, and Developers:** These groups would be made up of professionals in local governments including community planners. They should also include DER and other developers who regularly interact with utilities. Unlike community focused groups, these groups may be best facilitated professionally by members of the Winning Bidder’s staff, and these groups will likely not need to be compensated.

For communities, data collection is expected to require physical presence at community meetings and potentially the ability to communicate in multiple languages, depending on the community. This data collection will build on the informal outreach meetings documented in Attachment A, seeking to identify:

- What are each community’s and group’s needs from the electricity distribution system?
- How are those needs and potential needs communicated?
- Are these needs only communicated when a request for serving a new load or interconnecting a new DER is received?

Examples of data collection and community outreach that may serve as models for compensation include:

- San Diego Community Power Plan. San Diego Community Power paid \$4,000 to five different groups to co-host two rounds of listening sessions.
- PG&E Community Engagement Plan, Climate Vulnerability Assessment. PG&E paid \$9,000-\$10,000 to each group to do outreach and to co-host sessions over a 6-month period. However, the feedback was to shorten this timeframe to 2-3 months.
- SCE Community Engagement Plan, Climate Vulnerability Assessment. SCE paid \$11,000-\$12,000 to each of 11 members of a Climate Resilience Leadership Group that convened for 6 months.

¹³ California Tribal Gap Analysis (caltribalgapanalysis.org)

Collected data shall be gathered and organized both for analytical purposes of the Study, but also for permanent transfer to the CPUC to enable long-term engagement with the communities that participated during the Study. More information can be found on this in Task 7: Comprehensive Database of all Community Outreach Feedback.

Tasks and Deliverables for Objective 3

This objective maps to Tasks 3 and 4 and informs other subsequent tasks.

A first step will be to recruit and form the Community Advisory Groups. A preliminary list of these groups will be reviewed and then finalized, in addition to a schedule of Community Advisory Group Meetings.

The Winning Bidder will then collaborate with these groups to provide feedback on Objectives 4, 5, and 6. This feedback will primarily be for the needed inputs to the distribution planning process but will also encompass how the distribution planning process is meeting community needs.

Objective 4: Development and Evaluation of Metrics

The Winning Bidder should develop and subsequently evaluate metrics to gauge the effectiveness of the Distribution Planning and Outcomes Framework. These metrics should be used to both assess current statuses and future improvements for each IOU. Once developed, these metrics should be presented for public comment and review. The metrics developed will fall into three categories:

- Metrics of how well utility **community engagement** is working to capture community needs for distribution planning; these are inputs into the distribution planning process, and
- Metrics of how well the **distribution planning process and plans** translate available inputs from communities into plans to meet the needs of communities.
- Metrics quantifying how well the **outcomes** from the distribution planning process and plans meet the needs of communities.

These metrics should be measurable using publicly available data in a transparent manner allowing stakeholders to independently review and comment. Some examples of similar metrics that have recently been developed for other studies include:

- Social Burden Metric – a metric developed by Sandia National Labs that considers a population’s ability to acquire services and the available infrastructure’s ability to provide those services. CPUC’s Microgrids proceeding R.19-09-009 is using this metric.
- Net Energy Metering (NEM) Interconnection Timelines – a metric to assess how many months it takes to interconnect new DERs. These data are reported by each IOU quarterly per Ordering Paragraph 22 of Decision 20-09-035 in Interconnection Timeline Reports to the Director of the Energy Division and the service list for R.17-07-007. The California DG Stats website (<https://www.californiadgstats.ca.gov/>) also reports the Monthly Average Interconnection Time (in days) for each IOU.

- Two metrics that SCE has developed to assist with Climate Adaptation (as part of Rulemaking 18-04-019.)¹⁴
 - » Community Resiliency Metric (CRM) that quantifies each community’s resiliency to climate change
 - » Community Impact Metric or CIM helps identify the types of adaptations that SCE could build to prepare for Climate Adaptation

Other Metrics to Consider based on Informal Outreach Meetings

In addition to the metrics listed above, specific consideration should be given to metrics that can quantify issues raised during the informal community outreach meetings including:

- Reliability and Resiliency
- Interconnection
- Affordability
- Enabling Local Clean Energy

These metrics will be critical to building a public record to support and guide future improvements.

Tasks and Deliverables for Objective 4

The metrics in this objective will be developed in Task 4. These metrics will be fundamental in identifying recommendations and solutions that will be proposed in Tasks 4, 7, and 8.

A preliminary and final list of metrics will be developed for this objective as part of Task 4.

Objective 5: Gather and Report Community Feedback on Future Grid Study

Future Grid Study Overview

Under Track 2 of the High DER proceeding, Gridworks will be conducting a Future Grid Study to investigate a range of possible Distribution System Operator roles and responsibilities that could be adopted in the future. Currently, each IOU manages and maintains the distribution system in their territory, acting as a distribution system operator. The Future Grid Study will include a series of workshops in 2023 (Future Grid Study workshops). Workshop participants will explore the opportunities and challenges that various possible distribution system operator model alternatives present, specifically in relation to the operation of a

¹⁴ Workshop: Economic and Equity Impacts of Large Disruptions - Social Burden Index and ReNCAT - July 7, 2022. This is the second workshop in Track 5 of the Microgrids proceeding R.19-09-009 focusing on “Economic & Equity Impacts of Large Disruptions” - July 7, 2022

future grid that integrates large numbers of DERs in a manner that is cost-effective, safe, reliable, and in line with State policy. Stakeholders will be included in the development of California’s vision for the future grid, its design principles, the required functionality, and each step that must be taken to meet these objectives.¹⁵

Five workshops are planned in the Future Grid Study Workshop series:¹⁶

- Workshop #1 (Q1 2023): Visions and Objectives for a Future Grid
- Workshop #2 (Q1/Q2 2023): Operations Needed for the Future Grid
- Workshop #3 (Q2 2023): Gap Assessment: Identify gaps between the current model and the operations identified in Workshop #2.
- Workshop #4 (Q2/Q3 2023): Present and Socialize Distribution System Operator Model Proposals
- Workshop #5 (Q3 2023): Identify Barriers, Actions, Trade-Offs

Workshop summary reports will be prepared for each technical session. All presentations and documents developed for each technical workshop will be included in the proceeding record following each session, and formal comments will be requested. The Draft Future Grid Study is expected to be issued in 2023 following the workshop series and formal comments will be requested.

Draft Future Grid Study findings will be presented at a Track 2 *en banc*¹⁷ and feedback would be gathered from national and international experts on electric grid models and architectures (both existing and conceptual) and innovative approaches to DER integration (see High DER November 15, 2021, Scoping Ruling at page 10). A Final Future Grid Study would be prepared for consideration in the Track 2 Decision.

Community Feedback Options for the Future Grid Study

One of the planned objectives of this Distribution Planning Community Engagement Needs Assessment Study is to collect broader input than was originally scoped into the Future Grid Study work plan for the High DER Proceeding. Feedback would be sought from non-traditional stakeholders to CPUC proceedings: stakeholders that do not have the funding, staff, or time, to participate as an intervenor party to the High DER proceeding. This would include feedback from tribes, local governments, and advocacy organizations (see Appendix A for an example of the groups to be engaged).

Collecting and integrating this feedback presents some challenges as to timing and coordination with the existing High DER Consulting Team’s workplan and schedule as well as the proceeding schedule and workplan (Figure 3) adopted in the High DER Scoping Ruling.¹⁸

¹⁵ Adapted from High DER Consulting Team Scope of Work and CPUC Request for Proposals 20NS1109 Distribution Planning and DER Technical Services

¹⁶ As presented at The Electric Grid Education and Outreach Workshop held on Tuesday, August 23, 2022.

¹⁷ En Bancs are Commission-hosted public events held for a proceeding that are attended by all commissioners instead of the assigned commissioner alone.

¹⁸ The proceeding schedule anticipates a Track 2 Proposed Decision and completion of Track 2 activities by the end of 2023. The workplan is available at <https://docs.cpuc.ca.gov/PublishedDocs/Efile/G000/M422/K758/422758093.pdf>.

This section presents three options that stakeholders are requested to provide feedback on. Option 3 was used to develop the budget presented in this Draft SOW because it is considered to be the most conservative (most funding needed) for budget estimating purposes.

COMMUNITY ENGAGEMENT NEEDS ASSESSMENT STUDY

	2021		2022				2023				2024						
	2021-Q4	2022-Q1	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024-Q1	2024-Q2	2024-Q3	2024-Q4				
Track 1: Distribution Planning Process and Data Improvements	<p>Workshop on Electrification Impacts Study Objectives and Scope</p> <p>ICA and GNA Alignment and IOU Workplan Reports / Data Portals Improvement (Workshop, Focus Groups)</p> <p>DIDF Guidelines / Distribution Forecasting Working Group Workshop / Electrification Impacts Study and Workshop</p> <p>Community Engagement Needs Assessment Scope and Objectives Workshop</p> <p>Electrification Impacts Staff Proposal with Workshop / IOU ICA Refinements 1st Annual Reports and Workshop</p> <p>Phase 1: Proposed Decision (near-term actions)</p> <p>Community Engagement Needs Assessment Report and Workshop</p> <p>Data Portals Improvement Report / DPP Improvement Workshop</p> <p>DPP Guidelines Staff Proposal and Workshop</p> <p>Phase 2: Proposed Decision</p>																
Track 2: Distribution System Operator Roles and Responsibilities		White Paper and Workshop		Workshop Series (topics/sessions determined via white paper and workshop process)				Consultant Report and En Banc		Proposed Decision							
Track 3: Smart Inverter Operationalizati on and Grid Modernization Planning		SIO Workshop on Working Group Organization and Schedule		Working Group Series (topics/sessions determined based on first working group meeting/workshop)				Working Group Report		Staff Proposal and Workshop (SIO use cases and necessary grid mod technologies)		Phase 1: Proposed Decision		Grid Modernization Plan and GRC Alignment Staff Proposal and Workshop		Phase 2: Proposed Decision	

Figure 3: Adopted Work Plan (November 15, 2021, Scoping Ruling, R.21-06-017)

Option 1: Energy Division Staff Coordinates Community Feedback During Draft Future Grid Study Preparation and After Issuance

Under this option, Staff, with support from its existing High DER consulting team, would provide outreach during the Future Grid Study Workshop Series to gather feedback from stakeholders unable or unequipped to participate in what is expected to be a series of highly technical workshops. A diverse group of stakeholders would be engaged like those described in Appendix A, but outreach would be augmented and modified as needed based on stakeholder input. After issuance of the Draft Future Grid Study, Energy Division staff would conduct additional outreach as needed to facilitate stakeholder comment in preparation for the Track 2 en banc and facilitate party comments on the Track 2 Proposed Decision.

This option provides a balance of benefits in terms of maintaining proceeding schedule and ensuring voices from diverse stakeholders are considered during the Draft Future Grid Study development process as summarized here. It is also expected to be the least cost to ratepayers because the new consultant would not be scoped to work on Future Grid Study outreach.

Schedule:

- Pro: Minimal impact would occur on the adopted schedule for issuance of the Draft Future Grid Study, Track 2 en banc timing, and the Track 1 and Track 2 Decisions.
- Pro: The adopted Track 1 schedule would not be tied to Track 2 activities. For example, holding up the Draft Future Grid Study review process to wait for the new consultant to be hired and gather community input (see Options 2 and 3) could delay the proceeding schedule for Track 2.
- Other: There are no negatives with respect to seeking to maintain the proceeding's adopted schedule and work plan.

Engagement:

- Pro: Engagement would occur during Draft Future Grid Study development as opposed to subsequent to study development.
- Pro: Relationships formed during the Staff outreach process documented in Appendix A would continue to be developed.
- Con: Community engagement on the completed Draft Future Grid Study would be more limited than the other two options. The new consultant team would not be scoped to facilitate and document broad-based comments from non-traditional stakeholders about the Future Grid Study

Budget:

- This option would result in the lowest budget and least cost to ratepayers.

Option 2: New Consultant Presents Community Feedback at Track 2 En Banc and Documents Feedback in Appendix to Distribution Planning Community Engagement Needs Assessment Study

Option 1 would occur as described, but the Track 2 En Banc would be timed to occur after the new consultant (in coordination with Energy Division staff) have received initial feedback from a select group of

diverse communities on the Draft Future Grid Study. After the en banc, the new consultant would continue to seek feedback on the Draft Future Grid Study from a broader group of stakeholders during the course of conducting the outreach required to complete the Distribution Planning Community Engagement Needs Assessment Study. The final results of Draft Future Grid Study outreach would be documented in an appendix to the Distribution Planning Community Engagement Needs Assessment Study. Energy Division staff would participate in outreach facilitated by the new consultant as much as possible.

This option would cause a proceeding delay, but offers the benefit of broader-based outreach on the Draft Future Grid Study after issuance as summarized here:

Schedule:

- Pro: This option is not expected to delay the High DER proceeding as much as Option 3.
- Con: The Track 2 en banc would be delayed to ensure there is sufficient time to hire the new consultant and allow for the new consultant to conduct outreach.
- Con: Both the Track 1 and Track 2 decisions could be delayed, allowing time for completion of the Distribution Planning Community Engagement Needs Assessment Study, which would include an appendix of comments on the Future Grid Study.

Engagement:

- Pro: Engagement would occur during Draft Future Grid Study development as opposed to subsequent to study development (similar to Option 1).
- Pro: Relationships formed during the staff outreach process documented in Appendix A would continue to be developed (similar to Option 1).
- Pro: The Track 2 en banc and decision would benefit from broader-based outreach on the Draft Future Grid Study than under Option 1.
- Pro: If the Draft Future Grid Study is of interest to stakeholders being engaged by the new consultant with respect to distribution planning, the consultant would be scoped and well equipped to gather feedback on both topic areas.
- Pro: Findings from additional community engagement will be of significant relevance to the Commission and stakeholder as they consider the findings of the Draft Future Grid Study.
- Con: Community feedback gathered in time for the en banc would not be as robust as under Option 3.
- Con: Creates overlap and the need for ongoing coordination as two consultant teams under different contracts collect stakeholder feedback on the same Future Grid Study.

Budget:

- This option would include additional scope for the new consultant and, hence, require a larger budget and associated ratepayer costs than Option 1.

Option 3: New Consultant Prepares Future Grid Study Community Feedback Report and Presents the Draft Report at the Track 2 En Banc

Option 1 would occur as described, but the Track 2 En Banc would be timed to occur after development of a Draft Future Grid Study Community Feedback Report. The Report would be a completely separate deliverable from the Distribution Planning Community Engagement Needs Assessment Study. After the en banc, the new consultant would complete outreach and prepare the final version of the Future Grid Study Community Feedback Report in parallel with preparation of the Distribution Planning Community Engagement Needs Assessment Study.

This option is expected to result in the greatest amount of proceeding delay, but would result in the most robust outreach on the Draft Future Grid Study as summarized here:

Schedule:

- Other: There are no benefits with respect to maintaining the adopted proceeding schedule and work plan.
- Con: The Track 2 en banc would be significantly delayed, allowing sufficient time: to hire the new consultant, for the new consultant to conduct outreach, and for completion of a Draft Future Grid Study Community Feedback Report.
- Con: Both the Track 1 and Track 2 decisions could be significantly delayed, allowing time for completion of both a Draft Future Grid Study Community Feedback Report and a separate Distribution Planning Community Engagement Needs Assessment Study.

Engagement:

- Pro: Engagement would occur during Draft Future Grid Study development as opposed to subsequent to study development (similar to Option 1).
- Pro: Relationships formed during the staff outreach process documented in Appendix A would continue to be developed (similar to Option 1).
- Pro: The Track 2 en banc and decision would benefit from the broadest outreach on the Draft Future Grid Study of any option.
- Pro: If the Draft Future Grid Study is of interest to stakeholders being engaged by the new consultant with respect to distribution planning, the consultant would be scoped and well equipped to gather feedback on both topic areas (similar to Option 2).
- Pro: Findings from additional community engagement will be of significant relevance to the Commission and stakeholder as they consider the findings of the Draft Future Grid Study (similar to Option 2).
- Con: Creates overlap and greatest need for ongoing coordination as two consultant teams under different contracts collect stakeholder feedback on the same Future Grid Study, and one consultant is tasked to produce a standalone report about the other consult's report.

Budget:

- Option 3 is expected to include the most additional scope for the new consultant and, hence, require the largest budget of the three options.

Tasks and Deliverables for Objective 5

This objective maps to Task 5 in the project scope resulting in deliverables that are contingent on the option selected by the CPUC for inclusion in the final SOW.

Under **Option 1**, Energy Division staff would gather community input on the Future Grid Study. The SOW described in this document would not include Task 5 to support Energy Division outreach.

Under **Option 2**, slides presenting community feedback from initial outreach conducted on the Draft Future Grid Study would be presented at the Track 2 en banc. Additional outreach would subsequently be conducted with findings documented as an appendix to the Distribution Planning Community Engagement Needs Assessment Study.

Under **Option 3**, draft and final versions of a Future Grid Study Community Feedback Report would be prepared. The draft version would be presented at the Track 2 en banc. This is the option used for budget estimation in this SOW.

Note that Energy Division staff will complete Option 1 activities regardless of whether Option 2 or Option 3 are selected. All Option 1 activities are assumed to be included in the other two options.

Task 7 also maps to this objective because community input on the Future Grid Study would be collected and organized into the database.

Objective 6: Report on Distribution Planning Community Needs and Develop Recommendations for Improvement

This objective is to comprehensively document the outcomes of all activities undertaken as part of this SOW in a single Study. Given the general relationship between distribution grid planning and distribution grid operations, Future Grid Study outcomes are likely to be discussed in the Study regardless of the outreach option selected by the CPUC (see Objective 5 discussion).

The Study will accomplish several goals. One is to document community engagement efforts currently undertaken by the IOUs with respect to distribution planning. Although IOU engagement is the focus, engagement by other Californian organizations in support of distribution planning will also be documented (e.g., CPUC, CCAs, and CEC). See also Objective 1.

A second goal is to describe how the current IOU distribution planning process incorporates inputs from the existing community engagement process. Documenting feedback from diverse communities on what they want and need with respect to electrical utility distribution planning is a fundamental component of the Study. See also Objective 2.

In meeting these goals, the Study will inform the planned Track 1 Phase 2 Staff Proposal for development of Distribution Planning Process Guidelines to be adopted by the CPUC that will improve utility distribution planning processes, including community engagement.

Another Study outcome will be recommendations to improve the metrics established under Objective 4. These recommendations will need to be documented and supported in depth in the final Study. They will then be evaluated for potential integration into the Track 1 Phase 2 staff proposal. The selected contractor will collaborate with Energy Division and the High DER Consulting Team on the staff proposal as requested by Energy Division.

Recommendations based on Study findings may include, but not be limited to, those to:

- Improve the current Distribution Planning and Outcomes Framework, or potentially, recommend new models that will better meet community needs.
- Improve utility distribution planning processes to better respond to community needs and integrate the outputs from both the existing and proposed Distribution Planning and Outcomes Frameworks.
- Conduct ongoing evaluation of the metrics to assess Distribution Planning and Outcomes Framework improvements.
- Establish approaches for long-term partnership building with local communities and ongoing use of the data gathered during the Study and data collection platform, including the possibility for future consultant-supported activities.

Tasks and Deliverables for Objective 6

This objective maps to Tasks 6, 7, and 8. The bulk of these recommendations will be presented in the Task 6 Distribution Planning Community Engagement Needs Assessment Study. A database to support Study results and for consideration by the CPUC for ongoing outreach tracking is developed under Task 7. A subset of recommendations focused on the distribution planning process will be integrated into the Track 1 Phase 2 Staff Proposal as part of Task 8, in collaboration with the High DER Consulting Team.

Draft Project Budget, Deliverables, and Schedule

The estimated budget for this work is **two million dollars**, including at least **six hundred thousand dollars** earmarked to fund CBOs and tribes for outreach, workshops, and potentially survey incentives for a period from roughly September 2023 through September 2025 with most deliverables due by September 2024.¹⁹

The budget earmarked to fund the CBOs and tribes should include participation and survey incentives, payment for participant hours, and costs associated with room rental, food, and coffee/tea offerings at meetings. The Bidder's budget should reflect all costs anticipated to fully facilitate community engagement needs.

Key deliverables and dates include:²⁰

- July 2023: **Request for Proposals** Launched by Utilities
- September 2023: **Contract Executed** with Utilities for Consultant Team that Reports to CPUC Energy Division
- October 2023: **Kickoff meeting** with Energy Division and Launch of Study
- October/November 2023: Draft and Final **Research Plan**
- November 2023: **Community Advisory Groups** Established and Meetings Scheduled
- January 2024: **Memo 1**, describing the current community engagement efforts undertaken by the IOUs, CPUC, CCAs, and the CEC
- January 2024: **Memo 2**, describing how the current IOU distribution planning process incorporates the inputs from the existing community engagement process
- March 2024: **Metrics** finalized
- November to May 2024: Gather and Report community input on the Draft **Future Grid Study**

¹⁹ This estimate was developed based on Energy Division review of High DER consultant feedback about their partnerships in the energy consulting industry and review of utility costs and hours associated with outreach they are conducting in their Climate Adaptation proceeding (R.18-04-019) outreach. Note that firms may have higher or lower ranges based on their business model, overhead, and other factors.

²⁰ Dates subject to change based on High DER proceeding status.

- *June 2024: Draft Future Grid Study Feedback Report presented at En Banc for Draft Future Grid Study²¹
- August 2024: **Draft Distribution Planning Community Engagement Needs Assessment Study** and Workshop
- September 2024: **Final** Distribution Planning Community Engagement Needs Assessment Study and Workshop

The Final Distribution Planning Community Engagement Needs Assessment Study will directly inform these High DER proceeding deliverables and activities, with ongoing input from the new consulting team as needed:

- 2024: Input on Distribution Planning Process Guidelines Staff Proposal (Track 1 Phase 2)²²
- 2024/2025: Follow-up input and closeout for Final Future Grid Study (Track 2)
- 2025: Follow-up input and closeout for High DER proceeding activities as appropriate (all tracks, including Track 3, Phase 2 on grid modernization)

²¹ See options for gathering community input on the Future Grid Study described in the Future Grid Study Overview and Community Feedback Options section of this SOW.

²² The Distribution Planning Process Guidelines Staff Proposal will address each of the four scoping questions for Track 1, Phase 2: Distribution Planning Process Improvement (see Scoping Ruling at pages 5-6).

Draft Project Scope

This section presents the project scope of work (SOW). This SOW is written to complement the more technical work being done by the High DER Consulting Team. The key objectives this work intends to accomplish are further clarified in the ‘Project Objectives’ section above.

What this SOW does not do is prescriptively mandate the who and how the objectives will be met. Our experience is that allowing Bidders more flexibility in approaches to meet the objectives often results in innovative approaches that are more effective in meeting the needed objectives.

The Winning Bidder’s proposed work scope will detail and explain tasks and deliverables necessary to provide comprehensive results to meet the goals described in the Project Objectives . The following is an enumeration of tasks and deliverables:

Task 1: Project Management

This task establishes the duties and expectations of the Winning Bidder associated with executing the project and coordinating with the CPUC, IOUs, CBOs, and other stakeholders.

Task 1.1 General Project Management

The Winning Bidder will perform overall project management duties including the following, at a minimum:

- Facilitate a project kickoff meeting with relevant parties
- Confirm the project goals, schedule, milestones, deliverables, and points of contact
- Develop a schedule for all deliverables, interim and draft deliverables, and circulate and maintain the schedule with all parties.
- Track all deliverables against the schedule.
- Hold bi-weekly meetings with the CPUC ED Project Manager (PM) in which progress toward the goals for the previous two weeks and plans for the next two weeks will be discussed. Any deviation from the planned schedule or other issues will be addressed during these calls.
- Coordinate with stakeholders
- Manage invoicing on a schedule agreed on with CPUC ED PM.

Task 1.2 Project Kick-off Meeting

The Winning Bidder shall contact the CPUC ED PM and arrange a mutually agreeable date for a project kick-off meeting. The meeting will include the CPUC ED PM, the Verdant High DER PM, and other relevant parties. This meeting will include a comprehensive review and discussion of all aspects of the design and operations for the Project and include:

1. An overview of the Project’s objectives

2. A discussion of the approach to achieve the objectives including initial estimates of the number and types of CBOs and other parties that will be engaged as part of the community outreach efforts.
3. Discussion of potential or proposed additional research to support the research project.
4. Discussion of data needs for the research project
5. Discussion of schedule and agreement on deliverable schedule
6. Discussion of collaboration efforts required for the research project.

The Winning Bidder will provide the CPUC ED PM with a draft agenda 4 business days prior to the kick-off meeting and include feedback from the CPUC ED PM in the final agenda.

Within 5 business days after the meeting, the Winning Bidder will provide the CPUC ED PM with a memorandum memorializing the results of the meeting, identifying areas of agreement and any unresolved issues, and presenting any action items identified during the meeting.

Deliverables:

- Project schedule and any necessary adjustments to the schedule
- Draft and final kick-off meeting agenda
- Kick-off meeting memorandum

Task 2: Conduct Research Material Review and Collaborate/Interview CPUC, IOUs, the High DER Consulting Team, and other Stakeholders

The Winning Bidder shall review all materials necessary for the current California distribution planning efforts to gain basic knowledge including, but not limited to:

- Public comments on this SOW
- The Informal Outreach Meetings Summary and the detailed transcripts from the High DER Consulting Team
- Deliverables from the High DER Consulting Team
- The Assigned Commissioner’s Scoping Memo and Ruling for Rulemaking 21-06-017
- IOU Community Engagement Plans for Rulemaking 18-04-019 – Climate Adaptation
- San Diego Community Power’s Community Power Plan
- The California Energy Commission’s Order Instituting Informational Proceeding on Distributed Energy Resources in California’s Energy Future
- California Tribal Gap Analysis
- Other documents the CPUC ED PM deems relevant

Bidders are strongly encouraged to review all documents that are publicly available in preparing their bids.

The Winning Bidder should either be, or become, knowledgeable about best practices for community engagement with hard-to-reach, low- and moderate-income, rural, and tribal communities. In addition, the Winning Bidder should also assess and document the community engagement currently being undertaken by the IOUs, CCAs, and CPUC as part of Rulemaking 18-04-019 – Climate Adaptation and Rulemaking 19-09-009 Microgrids.

The Winning Bidder should interview CPUC and IOU staff to understand their ongoing community engagement efforts and how these efforts impact the research goals. The interviews should also assess ongoing planning for DERs and other utility, CCA, CPUC, and CEC programs designed to reduce customer bills and reduce or shift customer usage to improve customer satisfaction with their utility and the distribution system and provide for a cleaner, more resilient grid. For identified CPUC, CCA, and IOU community engagement efforts, the Winning Bidder should attempt to identify relationships with communities and CBOs that can be leveraged for this research effort including those from the aforementioned Rulemakings (18-04-019 and 19-09-009).

Additionally, the Winning Bidder should plan to consult with the High DER Consulting Team (specifically Verdant and Gridworks) and Energy Division to better understand how this work will fit into the work completed and planned in support of the High DER proceeding. This should also include a detailed review of the informal outreach meetings completed by Gridworks, Verdant, and Energy Division.

To help guide the development of the Research Plan, the Winning Bidder should undertake the activities listed above in Task 2 prior to developing the final research plan.

Deliverables:

- Memo 1, describing current community engagement efforts undertaken by the CPUC, CCA, CEC, and IOUs
- Memo 2, describing how the current IOU distribution planning process reflects the inputs from the existing community engagement process.

Task 3: Develop a Detailed Research Plan

The Winning Bidder will produce a draft Community Engagement and Needs from Distribution Planning Research Plan (Plan) and provide it to the CPUC ED PM and IOU PMs for input and comment. Elements of the plan should include, but are not limited to:

- *Study Objectives:* This section will present the goals and objectives of the outreach to communities beyond what is currently done.
- *Detailed Plan to Understand the Current Distribution Planning and Outcomes Framework (Project Objectives 1 and 2).*

- » Description of accessibility provisions to make work with communities accessible—include attributes of the schedule, locations, facilitation, translation,²³ and remote area access.
- » Use of financial compensation to support representation of historically underrepresented or excluded communities.
- » The new consultant would work both informally and formally (as desired) with the Disadvantaged Communities Advisory Group and Low-Income Oversight Board to ensure their feedback is incorporated into Research Plan development.
- » Note that this will result in the memos described in Task 2.
- *Detailed Plan to Develop Community Advisory Groups (Project Objective 3)*
 - » Description of plan to develop Community Advisory Groups, accessibility provisions to make work with communities accessible—include attributes of the schedule, locations, facilitation, translation, and remote area access.
 - » Planned use of financial compensation to support representation of historically underrepresented or excluded communities.
- *Detailed Plan to Develop Metrics and Use these Metrics to Evaluate the Distribution Planning and Outcomes Framework (Project Objective 4)*
- *Detailed Plan to Gather Feedback on the Distribution System Operator models presented in the Future Grid Study (Project Objective 5)*
- *Detailed Plan to Develop Recommendations to Improve the Distribution Planning and Outcomes Framework (Project Objective 6)*. This will include recommendations to provide ongoing evaluation of metrics to assess future framework and distribution planning improvements.
- *Deliverable Schedule and Due Dates*. Winning Bidders will summarize the deliverables and deliverable dates and will present a timeline for the Study.
- *Staffing Plan*: How the Winning Bidder will use their staff to accomplish this work.
- *Budget*: A detailed budget showing time, materials, participation incentives, and Community compensation that will be needed to accomplish this Study.

Deliverables:

- *Preliminary Draft Research Plan for Request for Proposals*: A preliminary draft of the plan will be submitted in response to the Request for Proposals.

²³ Not all documentation may need to be translated. The bidder should identify a translation approach that (for example) may rely on CBO funding for translation work, including selecting documents to translate, languages, and multilingual support for live events.

- *Draft Research Plan:* In the Draft Research Plan, the Winning Bidder will lay out the detailed steps to achieve the research goals of the engagement. The Draft Plan will be based on the Winning Bidder's proposal and preliminary draft and be further developed and finalized in consultation with the CPUC ED PM to ensure a complete understanding of the objectives, schedule, and work to be accomplished. The CPUC will set a timeline to provide comments on the Draft Plan. Upon receipt of PM comments, the Winning Bidder will update the Draft Plan. Additional drafts may be needed (up to two) depending on proceeding planning activities that may be required before public review of the Draft Plan.

The draft research plan should include a detailed description of the method and plans for seeking input from diverse representatives of local communities on the central questions and objectives of the study. It should include a detailed outreach plan for each IOU territory, subregion, and constituent type including: rural and urban governments, tribes, environmental and social justice communities and CBOs, representatives of commercial and residential customers.

- *Draft Research Plan:* The Winning Bidder will issue a Draft Research Plan to the High DER Service List (R.21-06-017)
- *Public webinar presentation of Research Plan:* The Draft Research Plan will be presented to a public webinar. Stakeholders will have 10 business days to provide public comments.
- *Reply to public comments:* The Winning Bidder will summarize Stakeholder comments in an excel table and provide public responses to comments within 15 business days.
- *Final Research Plan:* A Final Plan will be issued within 15 business days of the receipt of final Stakeholder, IOU, and CPUC comments

Task 4: Recruit and Work with Advisory Groups, Develop Metrics

The Winning Bidder shall propose an approach to fulfill Project Objectives 3, 4, and 6. The proposed approach will include developing Community Advisory Groups, describe community meetings, metric development and evaluation, and the development of recommendations to improve the on-going representation of community needs in the distribution planning process. The Winning bid will include, but is not limited to, the following elements:

- *Community Advisory Groups:* The Bidder will propose an approach for identifying groups they will recruit to participate in Community Advisory Groups to expand the existing IOU distribution planning community engagement efforts. These groups will fill gaps in the IOU's existing distribution planning community engagement efforts that were identified as part of Task 2.
 - » The Community Advisory Groups will be IOU specific and be designed to include CBOs representing local communities, CCAs, Tribal governments, and local governments, planners, and developers.
 - » The Winning Bidder's plan shall propose the anticipated number and type of organizations to be represented on each IOU's Community Advisory Group.

- » The Community Advisory Groups will be responsive to feedback from the Fall 2022 Informal Outreach Meetings and should build on these meetings and contacts.
- *Community Advisory Group Accommodations, Payments, and Meetings:* The plan should describe how the consultants will collaborate with the Community Advisory Groups to better understand ongoing community engagement and energy needs related to distribution planning.
 - » The proposal should describe the accommodations they will take to encourage participation, engagement, and other actions designed to ensure community trust in the process.
 - » The proposal should describe likely topics for the Community Advisory Group meetings.
 - Potential areas of focus include, but are not limited to, reliability and resiliency, enabling more distributed energy resources, energy affordability, and the interconnection of DERs.
 - The meetings should lead to a better understanding of the communities’ wants and needs and their understanding of existing barriers to fulfilling those wants and needs.
 - » The Bidder’s plan should include estimates of the number of meetings, where (geography) and how (virtual or in person) meetings will occur.
 - » Potential incentives or payments to community groups to provide resources to enable participation should also be proposed and identified in the proposal budget.
 - If the Bidder proposes surveys of community members or groups, please describe the potential survey population, the data to be gathered, and the likely incentive amounts.
- *Ongoing Consultation with the IOUs and CPUC ED PM:* The consultant should plan to meet with the IOUs and the CPUC to understand how the community distribution system needs will be incorporated into the IOU’s process to determine distribution planning priorities.
 - » What are the IOUs’ barriers to fulfilling the community needs.
- *Metric Development:* The consultant will use the information developed from the meetings with Community Advisory Groups and the IOUs to develop metrics to gauge the effectiveness of the current community engagement, distribution planning and outcomes cycle.
 - » Potential metrics include ones designed to gauge community engagement, the community distribution planning needs, how well the distribution planning process translates community needs into plans, and how well the outcomes of the distribution planning process meet the distribution needs of the communities.
 - » The consultant will work with these stakeholders to finalize these metrics.
 - » The Winning Bidder will propose how the metrics will be evaluated based on information gathered during the working group meetings and meeting with other stakeholders.

- *Recommendations:* The consultant will describe how they will use the findings from the Community Advisory Meetings, meetings with the IOUs and CPUC ED, and metric development and evaluation to develop recommendations.
 - » Develop recommendations in collaboration with the High DER Consulting Team and the CPUC to change the distribution planning process to better respond to community wants and needs.
 - » Develop recommendations to integrate the findings from this Study into the existing and proposed Distribution Planning and Outcomes Framework.
 - » Provide recommendations on the type and frequency of on-going community engagements to ensure the IOUs are aware of community needs and metrics are re-assessed, and new metrics are developed and evaluated if needed.

Deliverables:

- *Preliminary list of proposed members of the Community Advisory Group for each IOU.* The proposed list will be reviewed by the CPUC ED PM. Comments may be provided to revise the proposed list.
- *Finalized list of IOU specific Community Advisory Group members and Schedule of Community Advisory Group meetings.* Following outreach by the Winning Bidder and commitment by the community member/group, the consultant will provide the CPUC ED PM with the finalized Community Advisory Group members. The Winning Bidder will also develop a schedule of community advisory group meetings.
- *Draft and Finalized list of Metrics.* The Metrics should be reviewed by the CPUC ED PM and IOU PMs and other stakeholders prior to finalization.

Task 5: Future Grid Study Community Feedback Report

Inclusion of this task in the SOW depends on which option is selected by the CPUC. Refer to the Future Grid Study Overview and Community Feedback Options section of this draft SOW for a description of each option.²⁴

Regardless of which option is selected, either CPUC Energy Division or the new consultant (or both) will solicit feedback from the Disadvantaged Communities Advisory Group and Low-Income Oversight Board formally or informally (as desired) on the Draft Future Grid Study. If Option 3 is selected, the new consultant will also solicit comments on the Draft Future Grid Study Community Feedback Report from the two groups.

Task 6: Distribution Planning Community Engagement Needs Assessment

²⁴ Option 3 is used a basis for estimating the budget presented in this draft SOW and would include Task 5.

The Winning Bidder shall prepare a draft and a final version of the full Study that shall include the following sections (or as determined by the Final Research Plan):

1. Executive Summary emphasizing the major findings and the most significant recommendations.
2. Background or Introduction chapter including the research objectives and description of this Study.
3. Methodology chapter (This chapter shall be based on the Final Research Plan) describing and justifying the chosen approaches including:
 - A. Groups interviewed and/or surveyed
 - B. Selection and development of any advisory groups that may be utilized
 - C. Development and assessment of metrics
 - D. Collection of feedback on the Future Grid Study
 - E. Use of interviews/surveys/focus groups/advisory groups to develop recommendations to improve the Distribution Planning and Outcomes Framework
4. Analysis and Recommendations to:
 - A. Recommendations to improve the Distribution Planning Process to ensure it is responsive to community needs.
 - B. Recommendation on optimal frequency to re-evaluate metrics on Community Engagement and Outcomes to track progress
5. Appendices including, but not limited to:
 - A. Bibliography
 - B. Reference list
 - C. Summary of findings from surveys, interviews, and/or focus groups
 - D. Detailed tracking of comments in an easily accessible format (e.g., in excel or another widely available platform) of relevant community comments to allow traceability to the source of comments. This must be transferred to the CPUC ED as part of the final report.
 - E. Summary of Findings
 - F. Spreadsheet of Recommendations (also known as the “Response to Recommendations” Table)

At the discretion of the Energy Division Program Manager, the Winning Bidder may issue the draft report to be reviewed by the IOUs or other parties for factual errors, and by the Disadvantaged Communities Advisory Group and Low-Income Oversight Board for feedback, ahead of releasing it for public comment.

Deliverables:

- *Draft Study:* The CPUC ED PM will submit the Draft Study prepared by the Winning Bidder, after review and approval, for issuance to the High DER Service List (R.21-06-017).
- *Revised Draft Study:* The Winning Bidder will deliver to the CPUC ED PM a draft of the final report as described above. The CPUC ED PM, and Verdant High DER PM (State Contract #20NS1109) will have a mutually agreed on number days to provide comments on the Draft Plan. Upon receipt of PM comments, the Winning Bidder will update the Draft Final Report.
- *Public webinar presentation of Draft Final Study:* The Draft Final Report will be presented to a public webinar. Stakeholders will have 10 business days to provide public comments.

- *Reply to public comments:* The Winning Bidder will summarize Stakeholder comments in an excel table, provide the comments and the consultants response to the CPUC ED PM and other stakeholders. Upon receipt of CPUC ED PM approval, the public responses to comments will be posted.
- *Draft Final Study:* CPUC will issue a Draft Final Study prepared by the Winning Bidder to the High DER Service List (R.21-06-017).
- *Final Study:* A Final Report will be issued within mutually agreed upon number of days of the receipt of final Stakeholder, IOU, and CPUC comments.

Task 7: Comprehensive Database of all Community Outreach Feedback

The Winning Bidder will develop a database to track all feedback received during community outreach. This will include the feedback, the source of that feedback, the date received, and context (e.g., via email, during a specific meeting, etc.). This database will need to be in an easily accessible and searchable format (e.g., excel or Microsoft Access) that will be delivered to the CPUC for future use (e.g., follow-up community engagement activities that may occur and the ongoing tracking of follow-up engagements). Proprietary platforms that require additional subscriptions beyond Microsoft Office are not acceptable.

Task 8: Support Staff Proposal for Distribution Planning Process Guidelines and Associated High DER Tasks

The Winning Bidder shall work with the High DER Consulting Team and Energy Division to develop recommendations for “Ways in which utility distribution planning representatives could better engage with local and tribal governments, environmental and social justice communities, and local developers to ensure new planned loads and developments are factored into Utility DPPs and local concerns regarding distribution planning are adequately addressed.”²⁵ These will be based on the findings in the Final Study. The Winning Bidder will collaborate with Energy Division and the High DER Consulting Team on the Track 1 Phase 2 staff proposal and associated High DER tasks as requested by Energy Division. The new consultant would work both informally and formally (as desired) with the Disadvantaged Communities Advisory Group and Low-Income Oversight Board to guide High DER proceeding activities (as relevant).

²⁵ Assigned Commissioner’s Scoping Memo and Ruling for Order Instituting Rulemaking to Modernize the Electric Grid for a High Distributed Energy Resources Future Rulemaking 21-06-017, Question 3, Track 1 Phase 2. Dated November 15, 2021.

Appendices

Appendix A: Summary of Informal Outreach Meetings

Overview

Between September and November 2022, Commission staff with support from their consultants (Gridworks and Verdant) facilitated 20 informal tribal and community outreach meetings to begin the community engagement efforts for Track 1 and Track 2 of R.21-06-017, CPUC’s rulemaking to modernize the electric grid for a high distributed energy resources future (known as the High DER proceeding).

The informal outreach meetings were developed in response to public feedback requesting the CPUC engage with communities, particularly disadvantaged communities, following the CPUC’s May 3, 2022 Track 2 kick-off [workshop](#) titled “Evaluating Alternative Distribution System Operator Models for California”. The meetings were also shaped by stakeholder feedback and response to the CPUC’s August, 12, 2022, Ruling and August 23 [workshop](#) titled “Electric Grid Education and Outreach Workshop,” where initial outreach plans were presented to parties.

The outreach meetings gathered insight and input from tribes, local governments, and community-based organizations across a number of topics related to the High DER proceeding, including energy priorities as well as challenges and barriers to adopting clean energy and distributed energy resources. Meeting participants were invited to continue to engage with the High DER proceeding and its future workshops. The following summary provides a high-level overview of the informal outreach meetings.

Objectives

The CPUC’s objectives in hosting the informal outreach meetings were to:

1. Listen to tribes, local governments, and community-based organizations (“participants”) to gain an understanding of and gather information about:
 - A. The participants’ **priorities** with respect to energy (electric and gas);
 - B. The participants’ **challenges and barriers** to adopting clean energy technologies and distributed energy resources (DERs);
 - C. The participants’ **long-term visions** and the role of electric utilities and DERs in achieving those visions;
 - D. How the CPUC and California Energy Commission can achieve **meaningful tribal and community outreach** and establish partnerships; and
 - E. How the utilities (PG&E, SCE, and SDG&E) can best include the participants in **electric distribution system planning**.

2. Communicate to meeting participants how insights from these outreach meetings will be used to:
 - A. Inform development of a draft scope of work for a statewide **Community Engagement Needs Assessment** to launch in 2023; and
 - B. Gain insights about potential visions, objectives, and characteristics of a future electric grid for California, which will inform a **Future Grid Study** to be developed in 2023.

Outreach Meeting Participants

The CPUC invited organizations and individuals to the informal outreach meetings by contacting the agency’s existing outreach lists and encouraging contacts to share information about the sessions with other interested parties. Some parties to the High DER proceeding also encouraged their networks to participate in the meetings and helped to organize participants to attend the sessions. Finally, organizers contacted attendees of the August 23, 2022, Electric Grid Education and Outreach Workshop to gauge their interest in participating in outreach meetings.

Outreach was focused on reaching stakeholders not already active in the High DER proceeding and those who typically do not participate in CPUC proceedings in general due to the cost and time commitments required. In particular, organizers considered the following:

- Availability to participate and represent a tribe, local government, or community advocacy group;
- Status of the stakeholder’s local area on the CalEnviroScreen map of disadvantaged communities;²⁶
- Individual or organizational focus on energy, utilities, environmental justice, climate, sustainability, and/or social justice; and
- Location in investor-owned utility service territories.

Outreach meetings were not intended to comprise a statistical sampling of communities throughout California, but Commission staff tried to ensure as much stakeholder diversity as possible in the short time-period available. Based on participants’ interest and availability, small outreach meetings were grouped and organized around stakeholder roles, largely:

- Community-based, non-governmental, or advocacy organizations, termed “advocacy organizations” throughout this summary; and
- Local government organizations, including urban and suburban governments, rural and county governments, cities, and other municipal governments.

Tribal sessions were organized around the interest and availability of tribal government representatives and were grouped by geographical region.

²⁶ See <https://oehha.ca.gov/calenviroscreen/sb535>.

Meetings ranged in time, depending on the size of the participant list, from 30 minutes to 3 hours. Overall, the CPUC staff hosted 20 outreach meetings between September 19 and November 14, including more than 80 participants representing 45 jurisdictions/organizations and 10 tribes. The CPUC was also joined by California Energy Commission staff in all of the meetings.

Table 1: Meeting Date, Duration, Attendee Description, and IOU Service Territory

<i>Date</i>	<i>Duration</i>	<i>Meeting Participant</i>	<i>Jurisdictional IOU</i>
Sept. 19	30 minutes	Rancho Palo Verdes	SCE
Oct. 18	30 minutes	Center for Accessible Technology	Multiple
Oct. 18	75 minutes	Rural County Representatives of California; Kern County; San Diego County Water Authority; County of Ventura; County of Santa Barbara	Multiple; SCE; SDG&E; PG&E
Oct. 19	45 minutes	City of Palmdale	SCE
Oct. 19	75 minutes	OC Goes Solar; The Energy Coalition; Peninsula Clean Energy community advisory committee	SCE; multiple; PG&E
Oct. 24	45 minutes	City of Lemon Grove	SDG&E
Oct. 24	60 minutes	San Diego Community Power; San Diego Community Power Advisory Committee	SDG&E
Oct. 24	30 minutes	Climate Action Santa Monica	SCE
Oct. 26	45 minutes	City of Irvine; City of San Diego	SCE; SDG&E
Oct. 26	45 minutes	East Bay Clean Power Alliance; Local Clean Energy Alliance; Community Environmental Council; Grid Alternatives; The Climate Reality Project	PG&E; SCE
Oct. 26	75 minutes	Humboldt County; City of Fortuna; Redwood Coast Energy Authority; Redwood Coast Energy Authority community advisory committee; Environmental Protection Information Center	PG&E
Oct. 26	75 minutes	Climate Action Santa Monica; San Jose Community Energy Advocates; Clean Power Alliance; Clean Energy Alliance Community Advisory Committee; City of Del Mar	SCE; PG&E; SDG&E
Oct. 27	75 minutes	San Jose Clean Energy; Zero Impact Solutions; Cinnamon Energy; City of San Jose	PG&E
Oct. 27	60 minutes	Silicon Valley Clean Energy; City of Sunnyvale; City of Milpitas; City of	PG&E

		Mountain View; City of Morgan Hill; The Climate Reality Project	
Oct. 31	60 minutes	Hoopa Valley Tribe; Blue Lake Rancheria	PG&E
Nov. 3	45 minutes	Asian Pacific Environmental Network; Physicians for Social Responsibility Los Angeles	Multiple
Nov. 3	60 minutes	Bay Area Regional Energy Network; City and County of San Francisco; StopWaste	PG&E
Nov. 7	60 minutes	Yurok Tribe	PG&E
Nov. 7	3 hours	Chemehuevi Indian Tribe; Morongo Band of Mission Indians; Ramona Band of Cahuilla; Northern Chumash Tribal Council; San Manuel Band of Mission Indians	PG&E; SCE
Nov. 14	60 minutes	Elk Valley Rancheria	PacifiCorp

Outreach Meeting Format and Content

Outreach meetings began with a welcome from the facilitator and CPUC staff and roundtable participant introductions. Introductions were followed by a CPUC staff presentation on the High DER Proceeding and the purpose of the outreach meetings. Participants were then provided question-and-answer opportunities, before the facilitated conversations began. All meetings took place virtually over Zoom.

Discussion for each outreach meeting varied based on timing, target audience, and participant interest areas. Questions and input, grouped by topic and participant type, are summarized in Section 5 below.

Outreach meeting materials included:

- [Tribal outreach meeting agenda](#)
- [Tribal outreach meeting slides](#)
- [Community outreach meeting agenda](#)
- [Community outreach meeting slides](#)

Summary of Outreach Meeting Questions and Input

This section is organized according to the following stakeholder groups:

1. Tribal outreach sessions
2. Rural/county governments
3. Urban/suburban governments
4. Advocacy organizations
5. Meetings with mixed organizational representation, including advocacy organizations, local governments, community choice aggregators (CCA), and CCA advisory groups

In this section, the frequency of comments repeated by different participant organizations is noted by a parenthetical designation of (xNumber) following the statement. For example, (x2) demonstrates that two separate participants from different organizations made the same comment. A compilation of frequently repeated statements can be found in the table below:

Table 2: Frequent Outreach Meeting Participant Feedback

<p>Visibility & Partnership in Utility Planning</p>	<p>Participants, particularly in rural and tribal areas, expressed frustration with utility planning efforts, including a lack of shared data, poor communication and utility follow through, and utilities’ failure to include communities in planning efforts. Participants would broadly like to see better communication, transparency, and partnership in planning efforts.</p>
<p>Reliability & Resiliency</p>	<p>Participants expressed concern with frequent and lengthy power outages, whether due to public safety power shutoffs or other weather events. Outages have costly repercussions to residents and governance systems in myriad ways, including interruptions to local emergency response operations and residential needs for heating, cooling, and cold storage. All communities expressed the need for reliable and resilient energy service, and some expressed concerns about efforts to electrify communities without reassurance that power would be available when needed.</p>
<p>Cost & Affordability</p>	<p>Participants expressed deep concern with the cost and affordability of energy in California, particularly for communities that are disadvantaged, low-income, or on fixed incomes. Affordability concerns also impact community rollout of electrification, including costs of technologies and distributed energy resources. In some communities, the high cost of electricity encourages residents to adopt resources like rooftop solar to mitigate power bill expenses.</p>
<p>Interconnection & Grid Capacity</p>	<p>Participants expressed frustration with a lack of grid capacity to interconnect new loads, which hampers economic development efforts as well as can transportation and building electrification efforts. For some communities, connecting new building projects can take two years or more.</p>
<p>Energy Independence Through Microgrids</p>	<p>Participants expressed interest in achieving energy independence to promote community resiliency and reliability through the use of</p>

	microgrids powered by clean energy technologies. Participants were interested in the added benefit of selling power back to the grid.
Interest in DERs	Participants broadly expressed an interest in clean energy technologies and DERs, including solar, storage, vehicle electrification, and more.
Tribal Sovereignty	Representatives of tribes expressed a lack of support from the state and utilities in meeting energy goals. Participants expressed the need for recognition of tribal sovereignty, barriers to accessing programs, the need for technical assistance, more integrated planning efforts, and better dialogue to promote creative thinking.
Barriers to Electrification	In addition to cost, affordability, and energy reliability, participants noted that other barriers to electrification include low-quality housing stock for low-income residents and renters, and multifamily homes, difficulty and cost of retrofits and equipment upgrades, community needs for technical assistance, funding barriers, land-use issues, lack of incentives or awareness of incentives, and more.
New Actors in Utility Operations	Participants expressed interest in how utility operations can include new actors to perform functions like delivering subsidies and rebates, providing programs, delivering on equity, resiliency, and affordability outcomes, and planning and implementing clean energy projects.
Better Community Engagement	<p>All participants expressed the need for better community engagement from both the state and utilities. Participants commonly recommended that engagement should:</p> <ul style="list-style-type: none"> • prioritize relational rather than transactional engagement • respond to public feedback • prioritize language accessibility and disability accessibility • proactively meet communities where they are • utilize trusted partners such as local nonprofits and community organizations • prioritize regular interactions • vary meeting times and locations to respond to community needs • provide incentives for busy residents to engage, including food, child-care, and payments • promote energy literacy and understanding

A. Tribal outreach sessions

1. *What are your tribe's energy needs and priorities with respect to electricity and natural gas?*

- Frequent and lengthy outages have costly repercussions to community services, governance systems, and local businesses as well as to residents who need cold storage to refrigerate medications, who need to cool or heat homes, and who rely on the internet for communication and education. (x6)
 - » Community members using medical equipment have to go find generators. (x3)
- Regular public safety power shut-off (PSPS) and other outage events are problematic for residents and for tribal emergency response operations (x5)
- Tribes need reliable energy service. (x5)
- Tribes need resilient energy service. (x4)
- Communities living at the end of power lines and/or in remote and rugged areas experience burdensome service delays and outages. (x4)
- Power is not reliable. (x4)
 - » Outages can often be transmission related.
- Affordability and the cost of energy in California is a concern. (x2)
- Communities are burdened by high energy costs, especially considering low wages and income. (x2)
- A significant number of residents live without power. (x2)
- Energy infrastructure suffers from a lack of investment, hampering tribal energy goals. (x2)
- The comfort of air conditioning and heating is important to communities. (x2)
- Communities have experienced week-long power outages. (x2)
- Some tribes are not served by utilities at all and are 100% off grid, with no utility infrastructure that reaches the reservation. This creates severe economic development challenges.
- Residents use wood heating and have associated indoor air quality issues.
- Running fossil fuel generators is costly and burdensome in remote areas.
- Wildfires threaten tribal utility infrastructure in addition to burdening residents with PSPS events.
- Tribes are burdened with lengthy connection and power hook-up times.

2. *How can the utilities (PG&E, SCE, and SDG&E) best include tribes in electric distribution system planning?*

- Utilities do not include tribes in the planning process, making it difficult to plan for future projects. (x3)
- Utilities are not communicating well about disruptions to current operations, sometimes providing little to no information; (x3)
 - » This is exacerbated by telecommunications services going down when power is out.
- Proactively share data and plans. (x2)
- Respect tribal decisions to own their own infrastructure.
- PG&E can be a hindrance to project rollouts, taking a long time to complete projects and connect electricity to new development, and needs to improve tribal consultation services.
- Contract with tribes to do local work, such as vegetation management and tree removals.
- PG&E removes power poles prematurely and without discussing it with the tribe or landowners first.
- Work with tribes who are developing strategic energy plans to develop better relationships.
- Streamline approaches to development and disaster planning with tribes.
- Hire staff to proactively engage tribes in planning processes and with recognition of tribal processes.
- Provide more technical assistance and information about opportunities.
- Tribes should be engaged and afforded opportunities to comment when developing projects on tribal ancestral lands that are not part of reservations.
- Hire more people who understand tribal issues.

3. *What challenges and barriers does your tribe face in adopting clean energy solutions and distributed energy resources?*

- Tribes face energy challenges that are both technical and non-technical. (x2)
- Timing constraints and funding challenge coordination of distributed energy resource rollout with the implementation of other service changes such as broad band opportunities; communities do not want to dig up roads twice and do want to maximize funding. (x2)
- Assistance programs and other grant programs are not tailored to tribal needs and goals. (x2)
- Remote locations, difficult terrain create operations and cost challenges. (x2)
 - » Tsunami zones are shifting and create challenges.
- Infrastructure is at capacity, delaying tribal clean energy projects. (x2)
- Tribes may not have the staff or resources for master land-use planning or utility planning. (x2)

- Some tribes cannot access assistance programs and other grant funding at all due to requirements on the funding that require current energy service providers to be California providers, restrictions on matching funds qualifications, and unclear requirements that tribes waive sovereignty.
- Some tribes are challenged by net-metering policies in other states which prohibit them from selling power back to the grid, which may inhibit the tribe’s ability to adopt distributed energy resources.
- Piecemeal funding for projects challenges rollout. For example, a project may be funded for the first five miles but not an entire route.
- Tribes need technical/legal assistance to navigate programs and regulation.
- Technical assistance to understand possibilities and alternatives for technologies (especially emerging technologies) and systems is costly.
- Housing challenges make it difficult to hire and retain staff who could provide energy services and technical assistance.
- Upgrading homes to accommodate residential solar is challenging.
- Some tribes have little internal capacity to undertake projects.
- Tribes are experiencing delays with interconnection processes.
- Wind and solar resources require large footprints.
- Off-grid tribes face easement and right-of-way issues connecting to the grid.
- Tribes need better access to broadband and telecommunications services to support energy goals.
- Ratemaking challenges in creating tribal-owned utilities.

4. *What is your tribe’s long-term vision for a clean energy future?*

- Energy independence through tribal-owned and -operated microgrids powered by distributed energy resources such as solar, battery storage, wind, and micro-hydropower. (x7)
 - » Microgrids could keep emergency services, tribal communications, community necessities like groceries, and home systems running during regional outages.
 - » Microgrids could possibly be connected through a regional tribal energy system.
 - » Some communities want to be self-sustaining for at least 5 days.
- Selling power back to the grid to generate revenue for tribal community. (x3)
- Microgrid islanding capabilities to promote resiliency in times of larger regional outages.
- Microgrids and DERs providing safe spaces and necessities for people when emergencies happen and to coordinate with local governments and emergency responders.

- Microgrids and storage to help with resiliency and reliability needs due to being in a remote area.
- Interested in large scale solar.
- Interested in smaller solar and wind projects due to land-use issues.
- Serving ancestral territories and reservation communities with power.
- A decentralized power grid.
- Full electrification.
- Reduced reliance on fossil-fuels.
- Improved reliability for elderly, infants, and households.
- Increased automation to reduce costs.
- Improved energy efficiency to improve energy affordability.
- Off-grid tribes want grid access.

5. *How can the CPUC and California Energy Commission achieve meaningful tribal community outreach and establish partnerships?*

- Change regulations to reflect tribal sovereignty and barriers to accessing programs, adjust improper power dynamics between utilities and tribes, and support tribes in achieving goals. (x6)
- Provide technical assistance for project development and planning as well as assistance accessing funding opportunities. (x4)
- Engage tribes in regular dialogue that promotes creative thinking about institutional and economic challenges facing tribal energy goals. (x4)
 - » How can tribes expand their systems without repetitive costs and time delays?
 - » Include interpreters in the conversations to help everyone understand each other.
- Engage tribes in proactive, regular, and iterative planning efforts. (x3)
- Provide more, non-competitive funding to tribes. (x3)
- Engage tribes in wholistic planning that doesn't silo water issues from power issues and power issues from broadband issues. (x2)
- Understanding and respecting sovereignty is key to successful engagement with tribes. (x2)
- Provide better information about how proceedings will affect tribes. (x2)
- Remove state taxes from tribal energy bills. (x2)

- Conduct a rate component analysis to determine what programs are not applicable to reservations. (x2)
- Encourage utilities to plan better with tribes.
- Continue to engage with tribes regionally and individually. Engagement should reflect tribal processes.
- Planning efforts should include long-term plans and transitional plans and provide education to tribal staff.
- Agencies and CAISO could include tribal nations in scenario planning for capacity improvements.
- Coordinate tribal engagement by inviting other agencies to listen into meetings and by proactively sharing insights among agencies.
- Make changes to processes that are incompatible with tribal needs.
- Visit tribal lands to understand tribal needs firsthand, instead of making plans for tribes from remote cities with little direct knowledge of tribal needs.
- Ensure agency staff are seriously reviewing tribal concerns with planned energy projects, particularly offshore wind projects that could have consequences on wildlife, including migrating whales.
- Assist the development of tribal energy aggregators, similar to CCA model.
- Adjust infeasible utility planning processes to work for tribes.
- Improve mapping in planning and DER analysis by including tribal lands and engaging tribes meaningfully in that mapping process.
- Mandate a process for connecting off-grid reservations to the grid.
- Support development of tribal rates that do not include state or local taxes
- Assist with direct outreach to tribes about project development that is not spearheaded by utilities.
- Hire more people who understand tribal issues.
- Prioritize tribes in state equity goals.
- Proactively plan for the development of tribal utilities with tribes.

B. Rural/County Governments

1. *What are your communities' energy needs and priorities with respect to electricity and natural gas?*
 - Communities have reliability concerns when it comes to mass electrification. (x5)

- » How can communities deploy electric vehicle fleets when communities don't know if they'll have electricity to power the vehicles?
 - Many rural communities do not have reliable electricity, facing regular and frequent outages. (x3)
 - » Outages can last 20 hours or longer.
 - Wildfire continues to threaten communities that have already been burned over multiple times. (x3)
 - People are turning to fossil fuel generators in times of outages while we're supposed to be in a clean energy transition. (x2)
 - Affordability is concern, especially for renters and low-income residents. (x2)
 - Communities who are located at the ends of utility service territories/lines feel the pain points of load pockets in terms of reliability and growing service needs.
 - Agricultural communities also have concerns with reliability and electrification.
 - People depend on electricity for medical needs.
 - Public safety power shut-offs challenge ability to provide other essential services, including telecommunications and water.
 - Unplanned fast trip outages are rapidly increasing in number.
 - Residents face air quality and health concerns.
2. *What challenges and barriers does your community face to adopting clean energy solutions and distributed energy resources?*
- Difficult to achieve decarbonization goals when electric service is unreliable. (x2)
 - It can take 2 years or more to get power turned on for new building projects which threatens economic/financial viability of development projects. (x2)
 - Electrification for residents, including low-income and renters, face barriers of low-quality housing stock. How can mitigating these barriers to electrifying built environments be funded? (x2)
 - Technology adoption is a barrier.
 - Utilities are revoking "will serve" letters due to lack of capacity to meet existing needs, let alone state goals to rely more on the electric grid.
 - State policy, ISO policy, and utility planning is not aligned with rural community needs for development and reliable service.
 - State mandates pressure communities to change without giving them the tools to do it.
 - Paying for panel upgrades and infrastructure upgrades is a barrier.

- State funding and grants to pay for DERs or upgrades are very siloed.
- Local land-use issues can clash with clean energy development goals.
- Utilities don't share data and planning information.
- Equity issues of gas decommissioning and electrification—who will be stuck paying for the gas system?
- Local governments don't have the capacity to work directly in CPUC proceedings on these issues.
- How will we handle DER waste and recycling issues?

3. *What is your community's long-term vision for a clean energy future?*

- New actors in utility operations to deliver subsidies and rebates. Utilities don't have the best public relations, and communities are sometimes not comfortable enrolling in their programs. What other actors can provide services? CCAs and third-party implementors? (x2)
 - » IOUs not poised to deliver equity, resiliency, and affordability outcomes due to investor interest in making sure every dollar invested provides a rate of return.
- New actors to plan and implement projects. Other local agencies such as water providers can and are implementing pumped storage hydro and are building reservoirs, tunnels, powerhouses, and more. (x2)
- Incorporate equity at the start of the energy transition. (x2)
- Energy independence to promote resiliency, especially for other essential services like water service, in times of broader utility outages. Looking to generators and solar/battery combos.
- Microgrids.
- Resiliency centers.
- DERs and electrification to meet emissions goals.
- Clean energy world that includes direct air capture and green hydrogen projects. Interested in using solar for direct air capture, not just to supplement grid needs.
- Small biomass facilities combine benefits of energy and clearing overgrown forests instead of vegetation management work that equates to open burning (air quality issues).
- Wholistic planning approach to microgrids and remote grids to provide resiliency benefits for wildfire and other extreme weather events.
- Wholistic approach to storage, electrification, energy efficiency.
- New ways of funding infrastructure that aren't ratepayer based.

4. *How can the CPUC and California Energy Commission achieve meaningful community and stakeholder outreach and establish partnerships?*

- Prioritize relational engagement vs transactional engagement. Meet with communities every quarter all around the state instead of soloing engagement within specific proceedings and topics. Be more responsive to public feedback that comes in outside of proceedings. (x5)
- Local governments don't have time/capacity to engage in CPUC proceedings. (x2)
- Come to community planning meetings/other local government venues. (x2)
- CPUC isn't positioned for community engagement—issues are too far removed from local issues and the learning curve for community members is too steep.
- Use trusted community messengers who may not always be specialized in sustainability issues.
- Host en bancs in other areas across the state. Commissioners could meet with community advocates.
- Emphasize the issues you want local governments to engage on so they can focus attention.
- Re-examine fiscal relationships/fiscal equity between utilities and communities
- Agencies could look at studies from:
 - » the Greenlining Institute and California Environmental Justice Alliance;
 - » local government planning studies and economic outlooks, especially post-Covid 19;
 - » Kern County economic impact studies on California cities/counties phasing out gas cars;
 - » utility outage reports.
- CPUC public comments tab on website was a good update.
- State should not set one-size fits all mandates.
- Use clear, plain language—agencies use inaccessible language, even in the names of their proceedings
- Offer childcare, food, and compensation for people's time
- How can CPUC toe the line between direct democracy ideals and getting people up to speed to comment meaningfully on a proceeding—what about working groups?

5. *How can the utilities (PG&E, SCE, and SDG&E) best include communities in electric distribution system planning?*

- Utilities silo their approach to planning and are not thinking wholistically
- Utilities are not prioritizing capacity needs in rural communities.
- Utilities should include local government in planning before starting community outreach.

- Utilities should be more proactive about infrastructure maintenance and replacement; failures in planning currently result in telling communities no to service requests for new development or that there’s a 3-year wait.
- Communities are running out of transmission, which impacts economic development goals and electrification goals.
- Utilities should pay communities for use of land where plant is located so that communities share in benefits.
- Utilities should share data and planning information

C. Urban/Suburban Governments

1. *What are your communities’ energy needs and priorities with respect to electricity and natural gas?*

- Affordability is a concern (x5)
 - » Especially for low-income communities.
 - » Especially in areas with both warm summers and cold winters and other dramatic temperature changes.
 - » Especially for seniors on fixed incomes.
 - » Rates keep going up.
- High wildfire risk in areas with large open spaces and distribution lines. (x3)
- Comfort is a quality-of-life issue; communities depend on heating/cooling. (x2)
- Trying to underground lines. (x2)
- Growing communities need more power resources. (x2)
- Outages are challenging for residents, especially seniors using medical devices.
- Some cities looking to reduce gas load by 90 percent.
- Interest in electric mobility due to economic drivers such as gas prices.

2. *What challenges and barriers does your community face to adopting clean energy solutions and distributed energy resources?*

- Cost of electrification and DERs challenges local governments and residents. (x2)
 - » “Who pays” is a major barrier in energy conversations locally

- Some local governments are just starting outreach to understand their communities’ needs for a clean energy future.
- Many people can’t afford to get solar panels.
- Dust is reportedly lowering solar panel efficiency.
- Projects to install DERs, even with utility and state program support, are slow and difficult to get going.
- How can local governments support the numbers of electric vehicles they must purchase under electric vehicle laws across program areas? Do governments incrementally increase infrastructure or do they over-plan and potentially operate at budget losses now for future goals?
- Some do not want to electrify if gas is more affordable.
- Public safety power shut-offs challenge communities trying to electrify transportation.
- Housing mandates stress existing energy infrastructure.
- Many people can’t afford electric vehicles, and residents resent gas-powered vehicle bans.
- Communities are financially struggling with day-to-day life.
- Shifting residential patterns from homeownership to rentals and corporate owners who aren’t engaged in home solar. Solar applications are dropping.
- Tax credits for residential DERs can be too complicated for people to navigate—what is a better strategy for working class communities?
- Working and low-income communities have many older homes—what are the strategies for retrofitting them?

3. *What is your community’s long-term vision for a clean energy future?*

- Electric mobility options due to resident commute times and other economic drivers.
- Renewables.
- Developing a CCA.
- Distributed energy resources.
- Energy independence to ensure community has energy during major disasters.
- Residential solar/storage combinations.
- Microgrids.
- Undergrounding power lines.
- Sidewalks, walking areas, walkability, trees, and grass spaces—connectivity for our community.

- Plans and strategies are dependent on money—sales and property taxes. Without grants, it would be hard to implement strategies.
 - Energy resiliency (sometimes more than electrification).
 - Ensuring that gas system customers are not left with ballooning costs.
4. *How can the CPUC and California Energy Commission achieve meaningful community and stakeholder outreach and establish partnerships?*
- CPUC should prioritize language accessibility. (x2)
 - Consider spreading messages through media like radio, (ex. Spanish language radio) and allow listeners to call in to ask questions.
 - Consider community-based social marketing and behavior change, not just “getting the word out.”
 - Use local talent to help engage on larger state-level issues.
 - Partner with trusted community organizations, including faith-based organizations instead of using generic community meetings.
 - Working class residents are focused on getting food on the table and keeping roofs over their heads, so you need to meet them where they are.
 - Legal jargon is overly complicated—make it more understandable for the average person who doesn’t have a master’s degree.
5. *How can the utilities (PG&E, SCE, and SDG&E) best include communities in electric distribution system planning?*
- Prioritize language accessibility. (x3)
 - Go to communities and residents, don’t expect communities and residents to come to you. (x3)
 - Partner with local nonprofits and trusted community organizations who aren’t focused on energy. (x2)
 - » Faith-based organizations.
 - » Local governments and advocates.
 - » Chambers of commerce.
 - Prioritize myth-busting about electrification—residents are very concerned about reliability and resiliency. (x2)
 - Have regular meetings with local governments.
 - Provide food at community meetings.

- Hold community forums on specific topics.
- Vary meeting times to be easier for attendees, including weekends and evenings.
- Ensure direct engagement with communities, not just advocate groups that flood meetings and drown out local voices.
- Be transparent and communicative.

D. Advocacy organizations

1. *What are your communities' energy needs and priorities with respect to electricity and natural gas?*

- Affordability is a concern. (x4)
 - » People can't afford to run their A/C and washer/dryer at the same time.
- Communities have resiliency and reliability issues with their electric service. (x3)
- Lower income communities are interested in being part of the clean energy transition. (x2)
- Resiliency and reliability are life or death issues for people with disabilities; every community includes individuals with disabilities. Medical baseline program is an inadequate proxy for tracking outage issues for people with disabilities.
- Indoor and outdoor air quality are concerns.
- Effective, accessible, and improved communications during planned and unplanned outage events, which have rapidly increased in number and frequency.
- Improved outage mitigation options for medical baseline customers and other at-risk residents with disabilities; consideration of poverty challenges amplifying evacuation challenges for people with disabilities.
- Harmful energy infrastructure has been placed in environmental justice communities.
- Communities need safe, efficient, affordable energy.

2. *What challenges and barriers does your community face to adopting clean energy solutions and distributed energy resources?*

- Communities face landlord-tenant issues with solar and other DER rollout. (x3)
- Communities face financial barriers (x2)
 - » Developers also not interested in some community projects for financial reasons.

- Pathways to achieving DERs from regulatory, technical standpoints are unclear.
- Communities spend a lot of time trying to understand what’s possible and how to achieve it.
- Program opportunities do not always reflect community needs. For example, not all communities have program required space availability for solar projects, especially near DAC neighborhoods.
- Effective and accessible communication challenges for people living with disabilities. Outreach materials and efforts must be provided in accessible formats, such as:
 - » written materials in large print with sans serif fonts, braille,
 - » audio elements should be accessible,
 - » videos should be captions,
 - » presentations should have sign language, and
 - » virtual materials should meet electronic web standard WCAG2.1AA.
- Outreach solely via virtual methods is not adequate for people who do not have internet access; access to communications technology can be challenging.
- Accessible design of electric transportation challenges adoption of those technologies by people living with disabilities.
- Retrofits are challenging.
- Every community has different access issues.
- The digital divide is a huge barrier.

3. *What is your community’s long-term vision for a clean energy future?*

- Affordability; communities are interested in anything that will reduce bills, such as energy efficiency and weatherization.
- Resiliency options for customers with medical needs and disabilities, such as battery back-up power.
- Targeted investments in renewable energy to phase out fossil fuels and improve air quality.
- Energy resiliency to avoid blackouts.
- Infrastructure investment that doesn’t cause community displacement.
- Community-owned and -controlled distributed energy systems.
- Clean, affordable energy using solar, battery storage, and wind.
- Microgrids.

- Community solar for multi-family housing.
- Energy democracy; providing communities early and meaningful input; allowing communities to codesign policies and programs.
- Resiliency hubs that provide spaces for people to go during disasters.
- Equitable energy transition and decision-making.
- CCA framework is better than IOU framework.
- Cap and trade is not a good program for communities, consider policies promoting renewables and electrification to serve folks with lower incomes and to provide resiliency.
- Redesigning a distribution system within the context of an IOU monopoly defeats the purpose of redesign.
- Workforce training and local economic development and support.

4. *How can the CPUC and California Energy Commission achieve meaningful community and stakeholder outreach and establish partnerships?*

- Do proactive outreach instead of passively offering workshops. Workshops are a model of democracy that doesn't work for working people who have second shifts and kids to take care of. The only way to engage with communities is to put money down and bring people to the table. (x2)
- Do more direct service work with independent living centers and senior organizations; work with agencies that work with aging populations.
- Reach out to student groups and climate organizations to engage youth, who are very concerned about climate change. Start as young as possible. Consider engagement opportunities at later times to give kids and opportunity to engage after school and around commitments. Share information and learning opportunities to help kids engage.
- Work with communities directly to help them understand opportunities for DERs.
- Recognize ways in which geographic and demographic communities have overlapping interests, for example environmental justice communities and the broader community of people living with disabilities would benefit from improving air quality.
- In agency proceedings involving equity considerations, flag clear opportunities of where issues of consideration are community issues instead of technical issues to support communities in navigating regulatory processes; provide clear pathways for folks who aren't technical to know when their input is being solicited.
- Do more outreach meetings and listening sessions.
- Agency proceedings are difficult to track if you're not a lawyer.

- Models like CARB’s EJAC group and CPUC’s DACAG group are good—how can more environmental justice issues be part of the conversation?
 - Pay environmental justice organizations for their work—engaging with agencies is technical, laborious, and resource intensive.
 - Outreach should be multicultural and framed around language justice.
 - Agencies should coordinate to pass information back and forth.
 - Communities want transparency and a say in how rates are determined.
5. *How can the utilities (PG&E, SCE, and SDG&E) best include communities in electric distribution system planning?*
- Overly technical discussions do not engage communities. (x4)
 - » Listen to communities about what they want and how they want to use distributed energy resources in day-to-day terms
 - Meet communities where they are and have a participatory experience. (x2)
 - Engage communities early and meaningfully. (x2)
 - » Talk to communities about where they would like a charger; seek to engage in outreach prior to infrastructure being built.
 - Utilities have made some improvements, but they have a lot more work to do.
 - Work with communities directly to help them understand opportunities for DERs.
 - Invest in cultural competency.
 - Conduct outreach and engagement in more inviting community spaces.
 - Language access is important—don't just hyperfocus on English.
 - Add resources—community engagement takes time and resources.
 - Be accountable to communities.
 - The grid is not capable of an equitable future; we need a social dimension to distribution planning processes that can’t be based on historical levels of engagement.
 - Have dedicated teams with accountable goals.
 - Look at data and identify communities with historic divestment.
 - Improve distribution upgrades in disadvantaged communities.
 - Include CCAs in planning.

- Focus on BIPOC and immigrant communities and people with disabilities.
- More and better outreach to cities.
- Think outside the box and involve PTAs as well as climate groups.
- Bring people together to talk together.
- Trust-building takes time.

E. Meetings with Mixed Organizational Representation

These meetings included advocacy organizations, local governments, community choice aggregators (CCA), and CCA advisory groups.

1. *What are your communities' energy needs and priorities with respect to electricity and natural gas?*

- PG&E equipment failures are causing regular power outages for hundreds to hundreds of thousands of people. (x5)
- We need a resilient energy system. (x5)
 - » Rural areas are prone to extended outages, public safety power shutoffs.
- Southern Humboldt County has no power—the grid can't accommodate our needs. (x5)
- Cost and affordability are concerns. (x4)
 - » Especially for SDG&E customers.
- PG&E can't accommodate existing grid needs, including battery systems and EV charging—a lack of planning has caused this. (x4)
 - » Time from ask to time of potential hook up in 2024—2 years.
- More energy efficiency and weatherization measures. (x3)
- Communities care about climate change. (x3)
- Communities need capacity upgrades—PG&E customers waiting updates of a year for needed electric upgrades. (x2)
- Communities are interested in solar, energy efficiency, and other programs to reduce costs. (x2)
- Climate directives and unfunded mandates require a lot of investments from local governments, which is harder on DACs.
- DAC communities are more concerned with getting food on the table.

- Communities in inland and coastal areas face extreme heat and can't afford to run their air conditioning units.
 - Communities need better ventilation, and energy efficiency; better ways to regulate home temperatures without A/C.
 - When power is cut from cell towers, communication in evacuation is difficult.
 - People rely on power for medications and medical machines.
 - Low-income communities and disadvantaged communities are hardest hit by outages.
 - People are dying due to outages—one elderly person had no power for 72 hours; at one point 3 hospitals were without power.
 - EVs are taking off in wealthier areas.
2. *What challenges and barriers does your community face to adopting clean energy solutions and distributed energy resources?*
- Residential and commercial challenges include retro fits, line upgrades, and panel upgrades needed to install DERs. (x7)
 - Finding trusted installers is challenging. (x5)
 - » People don't want multiple contractors in their homes.
 - Commercial and residential customers face failing infrastructure. (x3)
 - Renters and multifamily units have particular challenges with DER rollout, including space and lack of capital to invest. (x3)
 - Communities need more and better information about how DER installs work and about the different products and technologies available. (x2)
 - How can we electrify when the grid isn't reliable or resilient? (x2)
 - Costs of distributed energy resources and their impacts to ratepayers are a challenge. (x2)
 - PG&E system has challenges hooking up existing needs for DERs; If we can't address PG&E capacity issues, we can't implement DERS. (x2)
 - Utility self-interest gets in the way of DER rollout—their business models do not motivate them to promote DERs. (x2)
 - Transmission and distribution infrastructure investments needed for DERs have the added cost of IOU returns.
 - Interested in microgrids, energy efficiency, EVs, electrification, heat pumps, and fuel switching, but there are no local vendors and contracts to do it.

- Remote locations add to costs for contractors and installers.
- Few available developers.
- Heatwaves are already stressing the grid; how will climate change continue to impact infrastructure?
- Space and real-estate constraints challenge solar rollout.
- Unintended consequences of islanding—renewable generators get dropped for the safety of the grid.
- Language barriers also challenging installation.
- Long interconnection times and permitting are a challenge—how can we simplify interconnection?
- Who will pay the costs of the gas system as people electrify?
- What other systems do we need in place to electrify, especially considering resiliency issues?
- Legal and policy barriers to microgrids and separating from the grid.
- Informational barriers.
- Funding barriers.

3. *What is your community's long-term vision for a clean energy future?*

- Communities are very interested in any technology that will save money, particularly interested in solar. (x2)
- Large scale solutions like wind power, including offshore wind. (x2)
- Affordable power. (x2)
- Microgrids. (x2)
- Decentralized power grid.
- Solar and storage.
- Communities are interested in storage systems, including advanced batteries, as a response to public safety power-shutoffs, especially in unincorporated areas.
- Better segmenting of the grid to promote resiliency and reliability in times of larger outages.
- More green public transportation options.
- More non-wires alternatives.
- Back-up power for large commercial facilities.
- Stable, affordable rates provided by clean energy.

- Better air quality.
- Increased EV adoption to meet local climate goals.
- Prioritizing local jobs in the clean energy transition.
- Making improvements for multifamily housing units.
- Developing and electrifying neighborhoods and districts at scale.
- Resiliency centers.
- Ceiling fans and space heaters for temperature control.
- Increased health benefits from clean energy (lower asthma rates, etc.)

4. *How can the CPUC and California Energy Commission achieve meaningful community and stakeholder outreach and establish partnerships?*

- Engage CBOs but recognize they are resource strapped and provide funding.(x3)
- Meet communities where they are; don't expect communities to come to you. (x3)
- Prioritize language accessibility. (x2)
- Coordinate conversations with CBOs so they aren't constantly engaged in similar but siloed conversations.
- Public workshops will attract the same voices over and over again.
- Bring in expert DER consultants to your proceedings.
- Make sure utilities are not profiting by discouraging DERs.
- Enforce rules—regulatory agencies are in the business of foxes guarding hen houses, which erodes public trust and discourages engagement with agencies.
- Communities know their needs, but not in CPUC terms; hire consultants to engage people from representative groups on energy issues.
- Hire consultants who can engage on rapid deployment of DERs.
- Show communities how DERs can put checks in their hands, provide other hands-on activities.
- Improve CPUC website or have a community-focused version that is easier to use and read.
- Work to increase public energy literacy.
- Consider other media and engagement options like radio.

5. *How can the utilities (PG&E, SCE, and SDG&E) best include communities in electric distribution system planning?*
- Utilities should provide better planning information and DER data, including GIS maps. (x5)
 - » Where is there capacity? What projects can capture value while avoiding system upgrades?
 - PG&E needs to provide better communication and follow through with commitments to local governments and residents. (x5)
 - Local governments are looking for long-term planning with utilities—PG&E is not providing long-term planning engagement. (x3)
 - Partner with trusted community partners and contract with organizations with field experience in the communities. (x3)
 - » Fire departments.
 - » School districts.
 - Engage CBOs. Recognize they are resource strapped and provide funding. (x2)
 - Prioritize language accessibility. (x2)
 - Meet communities where they are; don't expect communities to come to you. (x3)
 - Simplify interconnection processes. (x2)
 - Utilities need to closely coordinate with local governments.
 - Engagement is improving, but still isn't good.
 - Proactively upgrade and replace failing equipment.
 - Planning should take solar tax into account.
 - Hard to find a live person at a utility—develop better customer friendliness and accessibility to the public.
 - Make efforts to increase energy literacy.

Select Attachments Provided by Participants

Some participants provided additional materials to the CPUC during or following outreach meetings. A selection of those resources that are publicly available include:

- Brockway, Conde, and Callaway. *Inequitable Access to Distributed Energy Resources due to Grid Infrastructure Limits in California*. UC Berkeley. September 13, 2021. Available at: <https://escholarship.org/uc/item/6pc2k2tv>

- Moezzi, M. 2016, *Contractor Interview Findings: Perceptions of Latino Households' Views on Home Energy Upgrades*. Center for Sustainable Energy. Available at: <https://drive.google.com/file/d/1GuARquk2qOeu2sJyPV-SUMcK0zKbC6OY/view>
- Fournier, Eric Daniel, et al. "Net GHG emissions and air quality outcomes from different residential building electrification pathways within a California disadvantaged community." *Sustainable Cities and Society* 86 (2022): 104128. Available at: <https://www.sciencedirect.com/science/article/pii/S2210670722004413?via=ihub>
- Costa, Mark, et. al. "Using Big Data to Assess Energy System Transitions in Under-resourced Communities." Available at: https://aceee2022.conferencespot.org/event-data/pdf/catalyst_activity_32369/catalyst_activity_paper_20220810190450177_fc58836e_521e_4f1c_8024_67804a772721
- Mehdi, et al. "an ecosystem view of peer-to-peer electricity trading: Scenario building by business model matrix to identify new roles." *Energies* 14.15 (2021): 4438. Available at: <https://www.mdpi.com/1996-1073/14/15/4438>
- Capper, Timothy, et al. "A Systematic Literature Review of Peer-to-Peer, Community Self-Consumption, and Transactive Energy Market Models." *Community Self-Consumption, and Transactive Energy Market Models* (November 9, 2021) (2021). Available at: https://papers.ssrn.com/sol3/papers.cfm?abstract_id=3959620
- Schwidtal, Jan Marc, et al. "Emerging business models in local energy markets: A systematic review of Peer-to-Peer, Community Self-Consumption, and Transactive Energy models." *Community Self-Consumption, and Transactive Energy models (January 06, 2022)* (2022). Available at: https://papers.ssrn.com/sol3/papers.cfm?abstract_id=4032760